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ABSTRACT

The curriculum development project intends to assist and guide distributive and office education teachers in developing curriculum and guidelines for a well-planned office and distributive education training program on the secondary and adult level. To prepare students with entry-level competencies (skills, attitudes, and knowledges) compatible with the needs of employers, the guide contains student-oriented performance objectives, optional approaches to instruction, and provides for competency-based instruction. Competencies common to both distributive and office occupations are based on seven occupations selected through task analysis studies: general office clerk, clerk-typist, stenographer, salesperson, checker-cashier, service station attendant, and waiter-waitress. A model illustrates the competencies common to each occupation, and brief job descriptions are provided. Sixteen competency modules are contained in the guide: adding machine; data processing; grooming; handwriting; instructions; job application; making change; math computations; oral communication; references, manuals, directories, catalogs; simple business records; sorting, checking; verifying; spelling; telephone; working with people; and written communication. Each module, organized according to condition, performance, and standards headings, is complete with appropriate testing formats. (JB)

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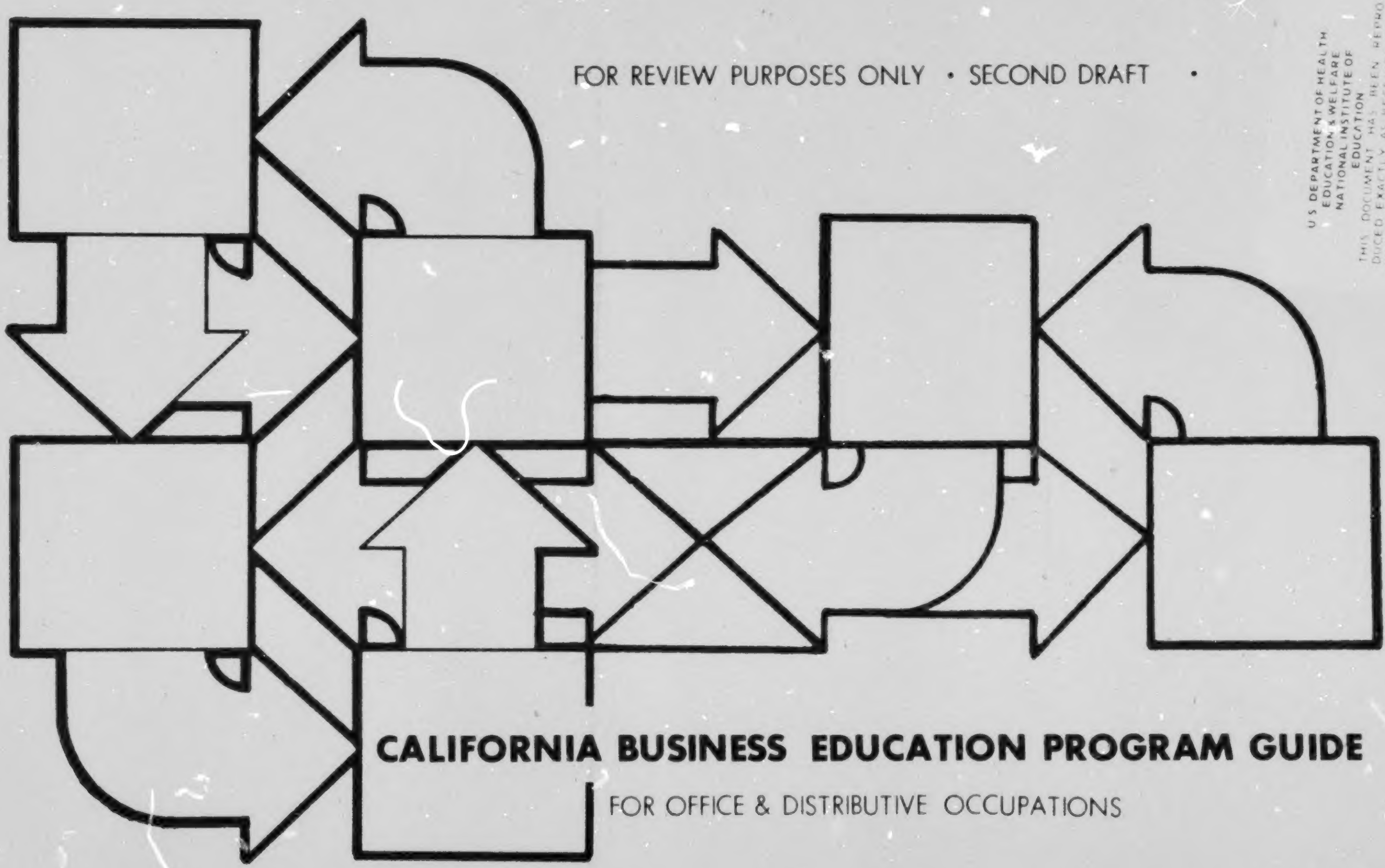

CALIFORNIA BUSINESS EDUCATION PROGRAM GUIDE

FOR OFFICE & DISTRIBUTIVE OCCUPATIONS

Developed by the Bureau of Business Education, California State Department of Education, Wilson Riles, Superintendent of Public Instruction, Sacramento, 1973

FEB 12 1975

UNIVERSITY OF CALIFORNIA, LOS ANGELES
DIVISION OF VOCATIONAL EDUCATION
OFFICE & DISTRIBUTIVE EDUCATION

PREFACE

There has long existed a need to develop a new structure within which office and distributive education could continue to prosper. The changing nature of the occupations for which we prepare our students, coupled with advances in educational technologies, makes the development of new frameworks both necessary and possible at this time.

The Bureau of Business Education, in acknowledging its mission to provide programs for use in California schools, undertook a major curriculum development project. This document represents the second draft of that effort. The office and distributive education programs in the schools of California should always reflect the changing needs of the employment community. Consequently, this curriculum project is an ongoing one which should never be considered a completed program. It is the intention of the Bureau to continually revise, update, and add to this new curriculum framework.

This significant achievement was made possible only through the efforts of a group of California business educators who gave tirelessly of their time and talents. The future success of this program should be attributed to them.

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SECOND DRAFT - FOR REVIEW PURPOSES

CALIFORNIA STATE DEPARTMENT OF EDUCATION

BUREAU OF BUSINESS EDUCATION

CALIFORNIA BUSINESS EDUCATION PROGRAM GUIDE

FOR

OFFICE AND DISTRIBUTIVE OCCUPATIONS

CALIFORNIA BUSINESS EDUCATION PROGRAM GUIDE FOR OFFICE AND DISTRIBUTIVE OCCUPATIONS

Purpose

To assist distributive and office education teachers of secondary and adult students in reappraising and updating the business education curriculum, the California State Department of Education, Bureau of Business Education, sponsored a Task Force which developed guidelines for a unified office and distributive education training program. To provide students with entry-level job competencies (skills, attitudes and knowledges) compatible with the needs of employers, the program was based upon identifiable competencies required for a cluster of distributive and office occupations rather than upon traditional courses. The system for managing the program was designed as a tool so that the transition from courses to competency-based instruction could be made with relative ease by teachers who work in a variety of school settings. The program includes student-oriented performance objectives and a number of optional approaches to instruction for the following:

1. Competencies common to both distributive and office occupations
2. An office core and a distributive core of competencies
3. Competencies for selected entry-level office and distributive occupations.

Tests and instructional checklists have been prepared for the competency modules.

Rationale

Seven occupations were selected for this study: General Office Clerk; Clerk-Typist; Stenographer; Salesperson, General; Checker-Cashier; Service Station Attendant; and Waiter-Waitress. These were chosen because they represented entry-level employment opportunities that are readily available to students completing office and distributive education programs. An investigation of task analysis studies determined those competencies needed by entry-level employees in the performance of their work. The need-to-know competencies included in this guide were based upon the following major studies:

Crawford, Lucy - A Competency Pattern Approach to Curriculum Construction in Distributive Teacher Education; (ED 032 382 -- ED 032 911) Virginia Polytechnic Institute and State University, Blacksburg, Virginia.

Davis, Gene and Smith, Art - Cooperative Occupational Survey -- Skills Identified with the Clerical and Sales Job Fields; Riverside, California.

Erickson, Lawrence W. - Basic Components of Office Work -- An Analysis of 300 Office Jobs; University of California, Los Angeles.

Ertell, Ken - Clusters of Tasks Performed by Merchandising Employees Working in Three Standard Classifications of Retail Establishments; (ED 023 911) University of Idaho, Moscow, Idaho.

Kallaus, Norman F. - Hiring Standards and Job Opportunities for Beginning Office Workers; University of Iowa, Iowa City, Iowa.

Perkins, Edward, et al. - Clusters of Tasks Associated with the Performance of Major Types of Office Work; Washington State University, Pullman, Washington.

The USOE classifications from Vocational Education and Occupations, the Dictionary of Occupational Titles and the Occupational Outlook Handbook were used for job descriptions. Inquiries were addressed to all county and major city government employers in California as well as many large enterprises which had been involved in the measurement of office work. Studies by the Human Resources Research Organization, Xerox, and Standard Oil of California were among those used to assist in further establishing standards of performance in the office occupation clusters.

Procedures

Based upon this data, the Task Force prepared minimum performance objectives for a sequence within each of the competency modules determined as necessary for entry-level employment. Available educational resources were searched, including Educational Research Information Center and Business Education Data Dissemination System, in an attempt to identify instructional strategies that would develop requisite competencies.

Limitations

The Guide was limited by including only seven of the multitudinous occupations which fall within the office and distributive occupational clusters. In addition, technologies which cut across other vocational areas cannot be effectively taught in isolation (i.e., competencies for some jobs such as service station attendant need to be taught in conjunction with other disciplines which were not represented in this project). Educational expertise such as counseling and guidance, tests and measurements must also be applied to the program. This guide was concerned only with need-to-know entry-level skills, attitudes and knowledges; however, it is fully recognized that these competencies do not encompass a complete business education program. Lastly, no attempt was made to identify and list all of the possible objectives and strategies. This guide represents a statement which will need continual validation, revision and expansion.

PROGRAM MODEL

The model was prepared to give an overview of the California Business Education Program for Office and Distributive Occupations. It shows that competencies common to both the distributive and office entry-level occupations have been identified. This concept is significant because it provides a foundation for job flexibility. The office core competencies are those which were identified as being common to the three selected office jobs: General Office Clerk; Clerk-Typist; and Stenographer. The distributive core competencies are those which were identified as being common to all four selected distributive jobs: Checker-Cashier; Salesperson, General; Service Station Attendant; and Waiter-Waitress. The model presents the concept that specialty competencies have been identified for each of the selected jobs in both the office and distributive components. No hierarchy was found in the distributive jobs, whereas the stenographer must obtain competence in the general office clerk and clerk-typist jobs, plus specialty competence for stenographer.

The Task Force recognized that individual guidance and preparation for the role of consumer are integral components of a total program; however, the constraints of this occupational study did not provide for the incorporation of these two vital aspects. Youth groups were noted for their importance to occupational training. Because it is imperative that individuals being trained for entry-level employment develop proper attitudes and know how to work with other people, human relations was flagged within the confines of the model to indicate the need for continuous attention to that subject area in addition to the suggestions in the study.

PROGRAM MODEL FOR OFFICE AND DISTRIBUTIVE OCCUPATIONS

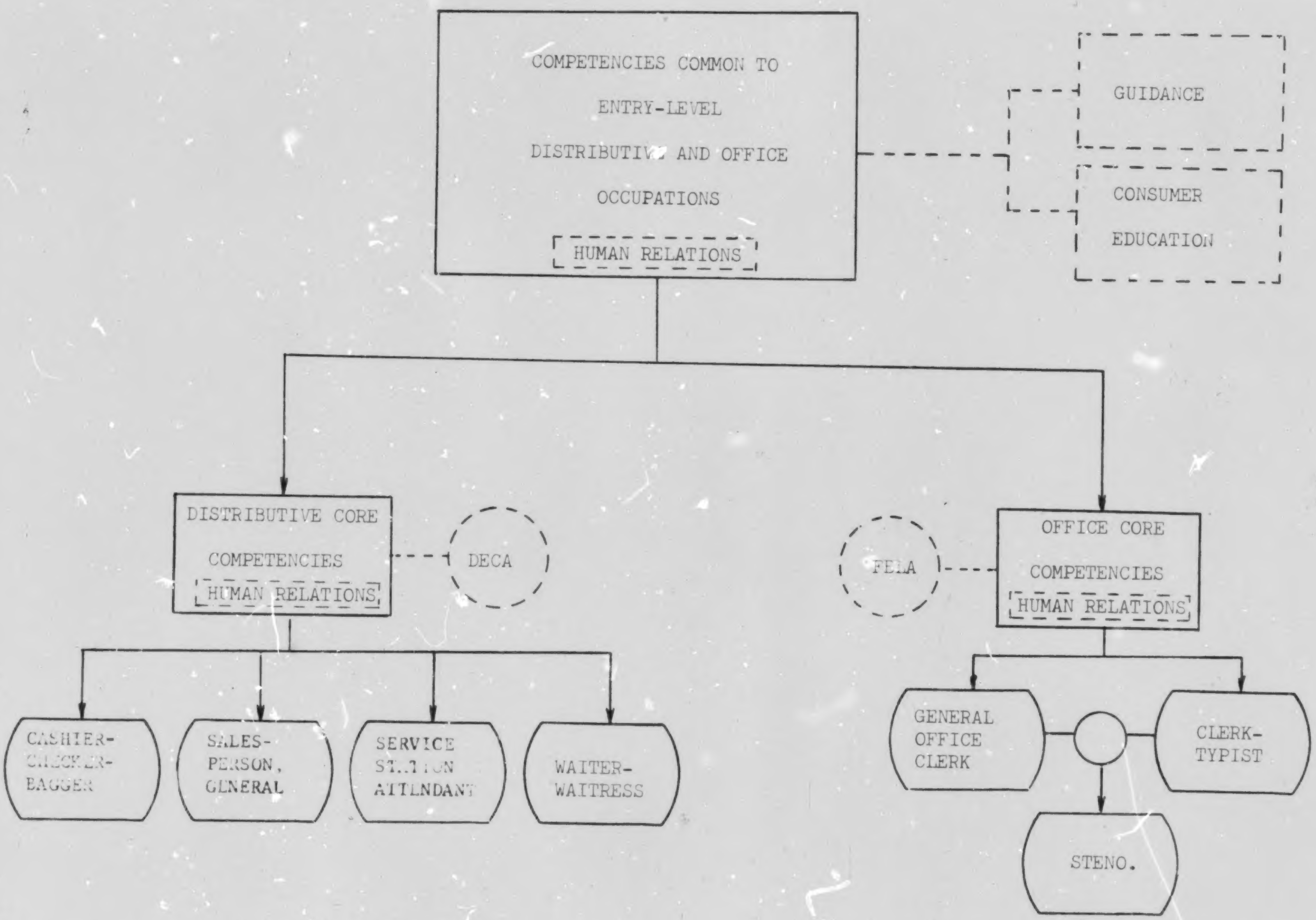

CHART OF COMPETENCY MODULES

100. COMMON CORE
    101. Adding Machine
    102 Data Processing
    103. Grooming
    104. Handwriting
    105. Instructions
    106. Job Application
    107. Making Change
    108. Math Computations
    109. Oral Communication
    110. References, Manuals, Directories, Catalogs
    111. Simple Business Records
    112. Sorting, Checking, Verifying
    113. Spelling
    114. Telephone
    115. Working with People
    116. Written Communication

200. OFFICE CORE
    201. Duplicating
    202. Filing and Retrieving
    203. Mail (Incoming and Outgoing)
    204. Petty Cash
    205. Spelling
    206. Typing
    207. Working with People
    208. Written Communication

300. GENERAL OFFICE CLERK
    301. Adding Machine
    302. Filing and Retrieving
    303. Mail (Incoming and Outgoing)
    304. References, Manuals, Directories, Catalogs
    305. Simple Business Records
    306. Telephone

400. CLERK-TYPIST
    401. Spelling
    402. Typing
    403. Written Communication

500. STENOGRAPHER
    501. Spelling
    502. Typing and Transcribing
    503. Written Communication

600. ADDITIONAL OCCUPATIONS

700. ADDITIONAL OCCUPATIONS

800. DISTRIBUTIVE CORE
    Orientation
    801. Careers in Marketing
    802. Marketing in Our Economy

    Competencies
    803. Basic Sales Techniques
    804. Cashiering (Cash Register and Sales Records)
    805. Communication
    806. Customer Services
    807. Employer-Employee-Customer Relations
    808. Sales Promotion
    809. Stockkeeping and Inventory Control

    Specialties
    810. Advertising
    811. Creative Selling
    812. Display

900. DISTRIBUTIVE OCCUPATIONS
    901. Cashier-Checker-Bagger
    902. Salesperson, General
    903. Service Station Attendant
    904. Waiter-Waitress

NUMERICAL SYSTEM

A system has been devised to identify the components of the competency modules included in the program guide.

Following is an explanation of the numerical system:

Code		Identifies
000		→ Program Level
		→ Competency Module
.01		Performance Objective
	.00	Objective Number
.02		Instructional Ideas
.03		Pretest
.04		Posttest
.05		Learning Activity Materials

Example:

101		→ Common Core
		→ Adding Machine
.01		Performance Objectives
	01	Add, Subtract, Multiply
.02		Instructional Ideas
.03		Pretest
.04		Posttest
.05		Learning Activity Materials

NUMERICAL SYSTEM

100.00.00 COMMON CORE COMPETENCIES

- 101.00.00 ADDING MACHINE
  - .01 Performance Objectives
    - .01 Add, Subtract, Multiply
    - .02 Sub and Grand Total
    - .03 Decimal Placement
  - .02 Instructional Ideas
  - .03 Pretest
  - .04 Posttest
  - .05 Learning Activity Materials

- 102.00.00 DATA PROCESSING
  - .01 Performance Objectives
    - .01 Terms
    - .02 Punched Card
    - .03 Printout
  - .02 Instructional Ideas
  - .03 Pretest
  - .04 Posttest
  - .05 Learning Activity Materials

- 103.00.00 GROOMING
  - .01 Performance Objectives
    - .01 Inventory
    - .02 Clothing Styles
    - .03 Stress Situation
    - .04 Regulations
    - .05 Dress
    - .06 Facial-Hair Style
    - .07 Grooming Plan
    - .08 Health Plan
    - .09 Complexion
  - .02 Instructional Ideas
  - .03 Pretest
  - .04 Posttest
  - .05 Learning Activity Materials

- 104.00.00 HANDWRITING
  - .01 Performance Objectives
    - .01 Legibility Factors
    - .02 Print and/or Cursive
    - .03 Business Forms
    - .04 Application Form
  - .02 Instructional Ideas
  - .03 Pretest
  - .04 Posttest
  - .05 Learning Activity Materials

- 105.00.00 INSTRUCTIONS
  - .01 Performance Objectives
    - .01 Identify Missing Elements
    - .02 True and False
    - .03 Record Numbers, Symbols
    - .04 Written Follow-up
    - .05 Oral Follow-up
    - .06 Remember and Repeat
  - .02 Instructional Ideas
  - .03 Pretest
  - .04 Posttest
  - .05 Learning Activity Materials

- 106.00.00 JOB APPLICATION
  - .01 Performance Objectives
    - .01 Vocabulary
    - .02 Social Security
    - .03 W-4 Form
    - .04 Employment Test
    - .05 Resume or Data Sheet
    - .06 Application Letter
    - .07 Application Forms
    - .08 Interview Questions
    - .09 Appointment, Telephone
    - .10 Simulate an Interview, Post-Interview Critique
    - .11 Follow-up Letters
    - .12 Payroll Voucher Terms
    - .13 Deductions
    - .14 Endorsement

NUMERICAL SYSTEM (continued)

100.00.00 COMMON CORE COMPETENCIES (continued)

106.00.00 JOB APPLICATION (continued)
.02 Instructional Ideas
.03 Pretest
.04 Posttest
.05 Learning Activity Materials

107.00.00 MAKING CHANGE
.01 Performance Objectives
.01 Set Up Cash Fund
.02 Handle Transaction
.03 Balance Cash
.02 Instructional Ideas
.03 Pretest
.04 Posttest
.05 Learning Activity Materials

108.00.00 MATH COMPUTATIONS
.01 Performance Objectives
.01 Add Whole Numbers
.02 Subtract Whole Numbers
.03 Multiply Whole Numbers
.04 Divide Whole Numbers
.05 Decimal Numbers
.06 Convert Common Fractions to Decimal Numbers
.07 Reduce Fractions to Lowest Terms
.08 Common Fractions
.09 Combinations of Whole, Decimal, Common Fraction
.10 Round-off Decimals to 1, 2, 3 Places
.11 Convert Fractions and Decimals
.12 Count and Record Information
.13 Read and Record Information from Table
.14 Convert Percent to Decimal, Decimal to Percent
.15 Multiply and Divide Basic Percentage Problems
.16 Measurements
.17 Weights

108.00.00 MATH COMPUTATIONS (continued)
.02 Instructional Ideas
.03 Pretest
.04 Posttest
.05 Learning Activity Materials

109.00.00 ORAL COMMUNICATION
.01 Performance Objectives
.01 Converse Spontaneously
.02 Recognize, Interpret, Recall, Ideas, Questions and Directions
.03 Answer and Ask Questions, Make Requests
.02 Instructional Ideas
.03 Pretest
.04 Posttest
.05 Learning Activity Materials

110.00.00 REFERENCES, MANUALS, DIRECTORIES, CATALOGS
.01 Performance Objectives
.01 Reference Questions
.02 Dictionary
.03 Abbreviations
.04 Telephone Directory
.05 Telephone Directory
.06 Telephone Directory
.07 City Directory
.08 City Directory
.09 Zip Code Directory
.10 Company Directory
.11 Employee Handbook
.12 Catalog
.13 California Road Map
.02 Instructional Ideas
.03 Pretest
.04 Posttest
.05 Learning Activity Materials

NUMERICAL SYSTEM (continued)

100.00.00 COMMON CORE COMPETENCIES (continued)

- 111.00.00 SIMPLE BUSINESS RECORDS
  - .01 Performance Objectives
    - .01 Telephone Messages
    - .02 Sales Receipts - Tally Sheet
    - .03 Bank Deposit Slip - Daily Cash Tally
    - .04 Inventory Control Sheet - Tally - Requisition Form
  - .02 Instructional Ideas
  - .03 Pretest
  - .04 Posttest
  - .05 Learning Activity Materials

- 112.00.00 SORTING, CHECKING, VERIFYING
  - .01 Performance Objectives
    - .01 Match and Sort by Number, Letter, Color
    - .02 Check and Compare Names
    - .03 Check and Compare Numbers
    - .04 Check and Compare Names, Numbers
    - .05 Copy in Specific Order
    - .06 Sort Alphabetically
  - .02 Instructional Ideas
  - .03 Pretest
  - .04 Posttest
  - .05 Learning Activity Materials

- 113.00.00 SPELLING
  - .01 Performance Objectives
    - .01 Commonly Used Words by Rules, by Error Patterns, Proofread for Errors
  - .02 Instructional Ideas
  - .03 Pretest
  - .04 Posttest
  - .05 Learning Activity Materials

- 114.00.00 TELEPHONE
  - .01 Performance Objectives
    - .01 Respond Spontaneously
    - .02 Answer Incoming Calls
    - .03 Place Outgoing Calls
    - .04 Pushbutton Phone Calls
    - .05 Pushbutton Phone Calls
    - .06 Incoming Long Distance Calls
    - .07 Outgoing Long Distance Calls
  - .02 Instructional Ideas
  - .03 Pretest
  - .04 Posttest
  - .05 Learning Activity Materials

- 115.00.00 WORKING WITH PEOPLE
  - .01 Performance Objectives
    - .01 Problem-Solving Distress Situations
    - .02 Identify and Rate Strengths and Weaknesses
    - .03 Improvement Plan
    - .04 Follow-up Rating
  - .02 Instructional Ideas
  - .03 Pretest
  - .04 Posttest
  - .05 Learning Activity Materials

- 116.00.00 WRITTEN COMMUNICATION
  - .01 Performance Objectives
    - .01 Incomplete Sentences
    - .02 Complete Sentences
    - .03 Incorrect Word Usage
    - .04 Punctuation
    - .05 Capitalization
    - .06 Composition
  - .02 Instructional Ideas
  - .03 Pretest
  - .04 Posttest
  - .05 Learning Activity Materials

NUMERICAL SYSTEM (continued)

200.00.00 OFFICE CORE COMPETENCIES

- 201.00.00 DUPLICATING
  - .01 Performance Objectives
    - .01 Fluid Duplicator
    - .02 Offset Printer
    - .03 Photocopier
    - .04 Mimeograph Machine
    - .05 Thermal Copier
    - .06 Paper Cutter
    - .07 Paper Punch
    - .08 Collate and Staple
    - .09 Loading Stapler
  - .02 Instructional Ideas
  - .03 Pretest
  - .04 Posttest
  - .05 Learning Activity Materials

- 202.00.00 FILING AND RETRIEVING
  - .01 Performance Objectives
    - .01 Arrange by Alphabet, Numbers
    - .02 File Alphabetically
    - .03 Retrieve, Checkout and Record
    - .04 File Numerically
  - .02 Instructional Ideas
  - .03 Pretest
  - .04 Posttest
  - .05 Learning Activity Materials

- 203.00.00 MAIL - PROCESS
  - .01 Performance Objectives
    - .01 Incoming Mail
    - .02 Outgoing Mail
    - .03 Interoffice Mail
  - .02 Instructional Ideas
  - .03 Pretest
  - .04 Posttest
  - .05 Learning Activity Materials

- 204.00.00 PETTY CASH
  - .01 Performance Objectives
    - .01 Establish, Maintain and Replenish
  - .02 Instructional Ideas
  - .03 Pretest
  - .04 Posttest
  - .05 Learning Activity Materials

- 205.00.00 SPELLING
  - .01 Performance Objectives
    - .01 Commonly Used Business Words by Error Patterns
    - .02 Recognition of Misspellings
  - .02 Instructional Ideas
  - .03 Pretest
  - .04 Posttest
  - .05 Learning Activity Materials

- 206.00.00 TYPING
  - .01 Performance Objectives
    - .01 Touch Type - 40/8 Errors
    - .02 Machine Control
    - .03 Locate, Mark Errors
    - .04 Correction Aids
    - .05 Rough Draft
    - .06 Divide Words
    - .07 Carbon Copies
    - .08 Work Station Care
    - .09 Cards
    - .10 Labels
    - .11 Letters
    - .12 Envelopes
    - .13 Memos
    - .14 Fold and Insert Documents
    - .15 Manuscript
    - .16 Forms
    - .17 Duplicator Masterset
    - .18 Thermal Copy Preparation
    - .19 Photocopy Preparation

200.00.00 OFFICE CORE COMPETENCIES (continued)

206.00.00 TYPING (continued)
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

207.00.00 WORKING WITH PEOPLE
- .01 Performance Objectives
  - .01 Employer/Employee
  - .02 Employee/Public
  - .03 Employee/Subordinate
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

208.00.00 WRITTEN COMMUNICATION
- .01 Performance Objectives
  - .01 Paragraphing
  - .02 Punctuation
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

300.00.00 GENERAL OFFICE CLERK COMPETENCIES

301.00.00 ADDING MACHINE
- .01 Performance Objectives
  - .01 Add, Subtract, Multiply
  - .02 Credit Balance
  - .03 Fractions to Decimals
  - .04 Multiply Decimals
  - .05 Percent
  - .06 Combination

301.00.00 ADDING MACHINE (continued)
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

302.00.00 FILING AND RETRIEVING
- .01 Performance Objectives
  - .01 Alphabetic
  - .02 Numeric
  - .03 Subject
  - .04 Geographic
  - .05 Follow-up Action
  - .06 Retrieve Folders
  - .07 Code Documents
  - .08 Cross-Reference
  - .09 Prepare Folders
  - .10 Reproduce Copies
  - .11 Checkout
  - .12 Abstract Information
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

303.00.00 MAIL
- .01 Performance Objectives
  - .01 Domestic
  - .02 Parcel Post
  - .03 Fourth Class
  - .04 Package - Prepare
  - .05 Special Handling
  - .06 International Mail
  - .07 Incoming
  - .08 Outgoing
  - .09 Interoffice
  - .10 Envelopes
  - .11 Mail List

NUMERICAL SYSTEM (continued)

300.00.00 GENERAL OFFICE CLERK COMPETENCIES (continued)

303.00.00	MAIL (continued)
.02	Instructional Ideas
.03	Pretest
.04	Posttest
.05	Learning Activity Materials

304.00.00	REFERENCES, MANUALS, DIRECTORIES, CATALOGS
.01	Performance Objectives
.01	Handbook
.02	Almanac
.03	Hotel-Motel Directory
.04	Thesaurus
.05	Atlas
.02	Instructional Ideas
.03	Pretest
.04	Posttest
.05	Learning Activity Materials

305.00.00	SIMPLE BUSINESS RECORDS
.01	Performance Objectives
.01	Bank Deposit
.02	Sales Slip
.03	Time Cards
.04	Stock Records - Incoming
.05	Stock Records - Outgoing
.02	Instructional Ideas
.03	Pretest
.04	Posttest
.05	Learning Activity Materials

306.00.00	TELEPHONE
.01	Performance Objectives
.01	Switchboard/Call Director Operation
.02	Instructional Ideas
.03	Pretest
.04	Posttest
.05	Learning Activity Materials

400.00.00 CLERK TYPIST COMPETENCIES

401.00.00	SPELLING
.01	Performance Objectives
.01	Common Business Words by Error Patterns
.02	Recognition of Misspellings
.02	Instructional Ideas
.03	Pretest
.04	Posttest
.05	Learning Activity Materials

402.00.00	TYPING
.01	Performance Objectives
.01	Touch Type - 40/8 Errors
.02	Transcribe Rough Draft from Machine
.03	Error Corrections
.04	Letter
.05	Transcribe Letter
.06	Compose Response Letter
.07	Outline
.08	Manuscript
.09	Minutes of Meeting
.10	Handwritten Tabulations
.11	Organize Tabulated Data by Columns, Form
.12	Financial Statement
.13	Mimeograph, Stencil
.14	Offset Master
.15	Duplicating Master Set
.02	Instructional Ideas
.03	Pretest
.04	Posttest
.05	Learning Activity Materials

403.00.00	WRITTEN COMMUNICATION
.01	Performance Objectives
.01	Composition
.02	Instructional Ideas
.03	Pretest
.04	Posttest
.05	Learning Activity Materials

NUMERICAL SYSTEM (continued)

500.00.00 STENOGRAPHER COMPETENCIES

- 501.00.00 SPELLING
  - .01 Performance Objectives
    - .01 Business Words by Error Pattern
    - .02 Proofread for Errors
  - .02 Instructional Ideas
  - .03 Pretest
  - .04 Posttest
  - .05 Learning Activity Materials

- 502.00.00 TYPING
  - .01 Performance Objectives
    - .01 Touch Type - 50/8 Errors
    - .02 Rough Draft from Dictation Notes
    - .03 Rough Draft from Transcribing Machine
    - .04 Transmittable Letter from Dictation Notes
  - .02 Instructional Ideas
  - .03 Pretest
  - .04 Posttest
  - .05 Learning Activity Materials

- 503.00.00 WRITTEN COMMUNICATION
  - .01 Performance Objectives
    - .01 Definitions
    - .02 Word Usage
    - .03 Five C's
    - .04 Editing
  - .02 Instructional Ideas
  - .03 Pretest
  - .04 Posttest
  - .05 Learning Activity Materials

600.00.00 ADDITIONAL OCCUPATIONS

700.00.00 ADDITIONAL OCCUPATIONS

800.00.00 DISTRIBUTIVE CORE COMPETENCIES

- 801.00.00 CAREERS IN MARKETING
  - .01 Performance Objectives
    - .01 Select Career Area
    - .02 Career Requirements
    - .03 Entry Job Requirements
    - .04 Competency Evaluation
  - .02 Instructional Ideas
  - .03 Pretest
  - .04 Posttest
  - .05 Learning Activity Materials

- 802.00.00 MARKETING IN OUR ECONOMY
  - .01 Performance Objectives
    - .01 Price Change Factors
    - .02 Economic/Marketing Trends
    - .03 Channels of Distribution
    - .04 Price-Weight Comparison
    - .05 Business Organizations
    - .06 Marketing System
  - .02 Instructional Ideas
  - .03 Pretest
  - .04 Posttest
  - .05 Learning Activity Materials

- 803.00.00 BASIC SALES TECHNIQUES
  - .01 Performance Objectives
    - .01 Approaches
    - .02 Buying Motives
    - .03 Substitution Selling
    - .04 Product Features
    - .05 Customer Benefits
    - .06 Demonstration
    - .07 Objections
    - .08 Closings
    - .09 Suggestion Selling
    - .10 Customer Assurance
    - .11 Sales Demonstration

NUMERICAL SYSTEM (continued)

800.00.00 DISTRIBUTIVE CORE COMPETENCIES (continued)

803.00.00 BASIC SALES TECHNIQUES (continued)
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

804.00.00 CASHIERING (CASH REGISTER & SALES RECORDS)
- .01 Performance Objectives
  - .01 Set Up Till
  - .02 Change Making Steps
  - .03 Cash Register Techniques
  - .04 Qualifying Tests
  - .05 Check Cashing
  - .06 Parts of a Salescheck
  - .07 Completing Saleschecks
  - .08 Charge Card Transactions
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

805.00.00 COMMUNICATION
- .01 Performance Objectives
  - .01 Oral Report
  - .02 Business Language
  - .03 Telephone Techniques
  - .04 Merchandise Description
  - .05 Listening Techniques
  - .06 Instructing Others
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

806.00.00 CUSTOMER SERVICES
- .01 Performance Objectives
  - .01 Cost-Profit Picture
  - .02 Check Authorization
  - .03 Customer Complaints
  - .04 Operational Problems
  - .05 Delivery Services
  - .06 Returns and Exchanges
  - .07 Service Desk Activities
  - .08 Credit Applications
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

807.00.00 EMPLOYER-EMPLOYEE-CUSTOMER RELATIONS
- .01 Performance Objectives
  - .01 Benefits of Good Customer Relations
  - .02 Salesperson Attitudes
  - .03 Dress Standards
  - .04 Solving Customer Problems
  - .05 Customer Relations Principles
  - .06 Demonstrating Attitudes
  - .07 Good Work Habits
  - .08 Co-worker Relations
  - .09 Supervisor Relations
  - .10 Solving Work Problems
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

NUMERICAL SYSTEM (continued)

800.00.00 DISTRIBUTIVE CORE COMPETENCIES (continued)

808.00.00			SALES PROMOTION
	.01		Performance Objectives
		.01	Media
		.02	Promotional Activities
		.03	Types
		.04	Kinds of Sales
		.05	Salesperson's Responsibilities
	.02		Instructional Ideas
	.03		Pretest
	.04		Posttest
	.05		Learning Activity Materials
809.00.00			STOCKKEEPING & INVENTORY CONTROL
	.01		Performance Objectives
		.01	Inventory Shortages
		.02	Stockkeeping Practices
		.03	Safety Rules
		.04	Inventory Control Reasons
		.05	Physical Inventory
		.06	Inventory Data
		.07	Perpetual Inventory
	.02		Instructional Ideas
	.03		Pretest
	.04		Posttest
	.05		Learning Activity Materials
810.00.00			ADVERTISING
	.01		Performance Objectives
		.01	Comparative Media
		.02	Objectives
		.03	Basic Psychological Wants
		.04	Secondary Wants
		.05	Headlines
		.06	Body Copy
		.07	Illustrations
		.08	Logotypes
		.09	White Space
		.10	Borders
		.11	Ad Writing and Layout
810.00.00			ADVERTISING (continued)
	.02		Instructional Ideas
	.03		Pretest
	.04		Posttest
	.05		Learning Activity Materials
811.00.00			CREATIVE SELLING
	.01		Performance Objectives
		.01	Basic Techniques Review
		.02	Customer Needs
		.03	Customer Types
		.04	Buying Decisions
		.05	Buying Signals
		.06	Merchandise Questions
		.07	Agreement Sentences
		.08	Overcoming Objections
		.09	Sales Attitude
		.10	Selling Demonstration
	.02		Instructional Ideas
	.03		Pretest
	.04		Posttest
	.05		Learning Activity Materials
812.00.00			DISPLAY
	.01		Performance Objectives
		.01	Display Objectives
		.02	Survey
		.03	Color
		.04	Design
		.05	Types of Displays
		.06	Building a Display
	.02		Instructional Ideas
	.03		Pretest
	.04		Posttest
	.05		Learning Activity Materials

NUMERICAL SYSTEM (continued)

900.00.00 DISTRIBUTIVE OCCUPATIONS COMPETENCIES

901.00.00	CHECKER-CASHIER-BAGGER
.01	Performance Objectives
.01	Work Procedures
.02	Taxable Items
.03	Store Layout
.04	Price Marking
.05	Bagging
.06	Pricing Produce
.07	Grocery Checking
.02	Instructional Ideas
.03	Pretest
.04	Posttest
.05	Learning Activity Materials
902.00.00	SALESPERSON, GENERAL
.01	Performance Objectives
.01	Work Procedures
.02	Closing Procedures
.03	Layaway
.04	C.O.D.
.05	Interpreting Labels
.06	Estimating Sizes
.07	Wrapping
.08	Delivery Dating
.09	Unit Control Records
.10	Checking and Sizing Price Tags
.02	Instructional Ideas
.03	Pretest
.04	Posttest
.05	Learning Activity Materials
903.00.00	SERVICE STATION ATTENDANT
.01	Performance Objectives
.01	Work Procedures
.02	Customer Impressions
.03	Sales Procedures
.04	Under the Hood Service
.05	Windshield Service
.06	Tire Service
.07	Credit Card Procedures
.08	Last Impressions
.09	Extra Services
.10	Job Safety
.11	Service Station Application
.12	Sales Demonstration
.02	Instructional Ideas
.03	Pretest
.04	Posttest
.05	Learning Activity Materials
904.00.00	WAITER-WAITRESS
.01	Performance Objectives
.01	Work Procedures
.02	Reasons for Good Service
.03	Food Handling Skills
.04	Food Merchandising Techniques
.05	Service Attitudes
.06	Restaurant Terms
.07	Operating Requirements
.02	Instructional Ideas
.03	Pretest
.04	Posttest
.05	Learning Activity Materials

JOB DESCRIPTIONS - OFFICE OCCUPATIONS

GENERAL OFFICE CLERK

Performs variety of following or similar clerical duties, utilizing knowledge of systems or procedures: Copies data and compiles records and reports. Tabulates and posts data in record books. Computes wages, taxes, premiums, commissions, and payments. Records orders for merchandise or service. Gives information to and interviews customers, claimants, employees, and sales personnel. Receives, counts, and pays out cash. Prepares, issues, and sends out receipts, bills, policies, invoices, statements, and checks. Prepares stock inventory. Adjusts complaints. Operates office machines, such as typewriter, adding, calculating, and duplicating machines. Opens and routes incoming mail, answers correspondence, and prepares outgoing mail. May take dictation. May prepare payroll. May keep books. May purchase supplies. May be designated according to field of activity as Death-Claim Clerk (insurance); or according to location of employment as Airport Clerk (air transportation); Camp Clerk; Colliery Clerk (mining and quarrying).

CLERK-TYPIST

Performs general clerical work requiring use of typewriter in majority of duties: compiles and types reports, bills, application forms, shipping tickets, and other matter from clerical records. Files records and reports, posts information to records, sorts and distributes mail, answers telephone, and performs similar duties. Computes amount using adding machine. May be designated according to records typed as Trust-Remittance Clerk (banking). May type on or from specialized forms and be designated C.O.D. Biller; Storage-Receipt Poster; Waybill Clerk.

STENOGRAPHER

Takes dictation in shorthand of correspondence, reports, and other matter, and transcribes dictated material, using typewriter. Performs variety of clerical duties (Clerk, General Office), except when working in stenographic pool. May transcribe material from sound recordings (Transcribing-Machine Operator). May perform stenographic duties in professional office and be designated as Legal Stenographer; Medical Stenographer; Technical Stenographer. May take dictation in foreign language and be known as Foreign-Language Stenographer. May be designated according to department in which employed as Police Stenographer (government service). May work for public stenographic service and be designated Public Stenographer.

JOB DESCRIPTIONS - DISTRIBUTIVE OCCUPATIONS

CHECKER-CASHIER-BAGGER

Itemizes and totals customer's purchases in self-service grocery or department store, using cash register. Reviews price sheets to note price changes. Records price on cash register. Collects money from customer and makes change. May stock shelves, weigh items, bag merchandise, and issue trading stamps. May be designated according to items checked as Grocery Checker.

Bags groceries in sack or carton and carries or pushes them in cart to customer's car. Collects shopping carts from parking areas and returns them to store. Replaces cleaning and wrapping supplies used at food check-out counter. Cleans work area and carries empty bottles and trash to storeroom. May price and stack food articles on shelves.

SALESPERSON, GENERAL

Sells variety of commodities in sales establishment. Displays merchandise, describes selling features to customer, and advises customer in making selection by explaining use of particular article or suggesting other articles. Prepares sales slip and receives payment for article. Replenishes supply of merchandise on display. May demonstrate use of merchandise. May examine defective article returned by customer to determine if refund or replacement should be made. May estimate quantity of merchandise required to fill customer's need.

SERVICE STATION ATTENDANT

Services automobiles, buses, trucks, and other automotive vehicles with fuel, lubricants, and accessories. Repairs or replaces tires. Replaces lights, and washes and waxes vehicle. Collects payment for services and supplies in cash or by completing credit card sales form. May sell batteries and automobile accessories usually found in service stations. May assist in arranging displays, taking inventories, and making daily reports.

WAITER-WAITRESS

Serves food to patrons at counters and tables of coffeeshops, lunchrooms, and other dining establishments where food service is informal: Presents menu, answers questions, and makes suggestions regarding food and service. Writes order on check or memorizes it. Relays order to kitchen and serves courses from kitchen and service bars. Observes guests to fulfill any additional request and to perceive when meal has been completed. Totals bill and accepts payment or refers patron to cashier. May ladle soup, toss salads, portion pies and desserts, brew coffee, and perform other services as determined by establishment's size and practices. May clear and reset counters or tables at conclusion of each course.

1[illegible] COMMON CORE

Competency Modules

101. Adding Machine
102. Data Processing
103. Grooming
104. Handwriting
105. Instructions
106. Job Application
107. Making Change
108. Math Computations
109. Oral Communication
110. References, Manuals, Directories, Catalogs
111. Simple Business Records
112. Sorting, Checking, Verifying
113. Spelling
114. Telephone
115. Working with People
116. Written Communication

COMMON CORE

Based upon occupational analysis studies and techniques, sixteen competencies common to both the office and distributive areas of instruction were identified in this section (i.e., persons entering the job market via either an office or distributive occupation must possess requisite ability in all of these competencies).

Typing competency was not included in the Common Core because that skill was not required for the distributive occupations incorporated in the Guide. However, because typing competency would be needed and helpful in many distributive occupations other than those identified, all students should be encouraged to develop typing skill to enhance job flexibility and upward mobility.

Performance objectives for the sixteen fundamental competencies were designed so that a student's ability to use his knowledge effectively in execution of an entry-level job task could be measured according to standards that are compatible with minimum industrial requirements. Additional performance objectives with appropriate standards were included in the succeeding cores and specialized job categories. The common core competency modules were presented in alphabetical order. The teaching-learning system based upon this common core of skills is adaptable to individualized instruction; therefore, a student may challenge a module, proceed on one or more modules at a time, or progress through selected common core and specialized competencies concurrently. Based upon a student's demonstrated level of competence, his motivation, and aspiration, the teacher can arrange an appropriate sequence of study. The instructional ideas related to the performance objectives were in no way inclusive; however, they have been used successfully in a classroom.

Number	Condition	Performance	Standard
101.01.01	Given a 10-key adding machine and 10 problems involving addition, subtraction, and multiplication	the student will compute the answer using the touch method of operation	with 90% accuracy
101.01.02	Given a 10-key adding machine and 10 problems requiring a subtotal and grand total	the student will compute a subtotal and grand total using the touch method of operation	with 90% accuracy
101.01.03	Given a 10-key adding machine and 10 problems involving decimal placement	the student will determine the decimal placement	with 90% accuracy

Instructional Ideas

Notes

General:

A. Carefully select problems for 10-key adding machine for basic skills:
  - addition
  - subtraction
  - multiplication
  - subtotal
  - grand total
  - decimal placement
  - repeat key
  - corrections
    before printing using correction key
    after printing by appropriate adjustment

B. Have the vendor, teacher, or a student demonstrate the fundamental operations of the machine, including changing of the tape with or without a checklist.

C. Use filmstrips, slides, audio tapes and video tapes on the operation of the 10-key adding machine.

D. Provide problems which simulate both office and distributive applications.

E. For realism, use actual business forms while performing machine calculations including verification.

F. Provide opportunities for every student to improve his skill through a variety of problems involving the use of repetitive drills for mastery of techniques.

G. Provide for individual differences by assigning supplementary problem work which is appropriate for the student's maturity and ability level.

Instructional Ideas

Notes

General:

H. Have students prepare bulletin boards which relate to the adding machine (operation, use of, classified ads about adding machine operators, etc.).

I. The objectives are appropriate for pocket-size electronic calculators with the possible exception of the touch system requirement.

J. Utilize instructional manuals for the operation of the particular machines available.

K. Prominently display fingering charts.

L. Using business forms such as checks and sales tickets in a variety of sizes, run a tape, total, and verify by checking source document, running a second tape, or comparing answer against key.

M. Provide a flowchart of fundamental operations of adding, subtracting, multiplying, correcting errors, and repeating numbers at each machine.

N. Compute business problems from handwritten figures.

O. Give students business problems with and without errors in computations to verify and correct those that are incorrect.

Number	Condition	Performance	Standard
102.01.01	Given 10 common data processing terms	the student will define each term	with at least 70% accuracy
102.01.02	Given a standard punched card	the student will interpret the contents	with at least 90% accuracy
102.01.03	Given a computer printout and a source document	the student will describe how the source document contributed to the output	to the teacher's satisfaction

Number **Instructional Ideas** **Notes**

102.02.01 A suggested list of data processing terms is as follows:

1. CPU
2. computer
3. computer printout
4. EDP
5. GIGO
6. hardware
7. input-output
8. magnetic tape
9. mark-sense card
10. OCR
11. off-line/on-line
12. paper tape, punched
13. programming
14. pegboard
15. punched card
16. source document
17. storage
18. terminal
19. time-sharing

102.02.03 One application of data processing is payroll, since it is universal and has a great deal of appeal. If the student punches his time card in the morning, and the payroll procedure is automated, how does his application affect the total application?

Another application might be inventory. What effect does the pulling of a card have each time an item is taken from stock?

A third application might be accounts receivable. How does a partial payment affect the accounts receivable data processing application?

Other examples of printouts include:
1. Bad credit cards checklist
2. Inventory control printouts
3. Student schedules
4. Employee earnings statements
5. Bank statements

General: For a discussion on ethical concerns, refer to Rothman, Computers and Society, Science Research Associates.

Number	Condition	Performance	Standard
103.01.01	Given a grooming and wardrobe inventory sheet	the student will list his own grooming and wardrobe identifying strengths and weaknesses	compared to business standards
103.01.02	Given a list of clothing appropriate for various entry-level jobs, a chart of body types, and a chart of styles and colors of clothing	the student will select appropriate clothing styles and colors	suitable for his body type
103.01.03	Given a simulated stress situation related to grooming	the student will be able to maintain his composure and correct the problem	as verified by group and/or teacher judgment
103.01.04	Given a list of entry-level job titles	the student will list acceptable grooming policies for 3 jobs	in accordance with companies in the job market area
103.01.05	Given information on appropriate dress for entry-level jobs	the student will dress appropriately	to the satisfaction of the majority of the group based on a rating sheet
103.01.06	Given a mirror and a chart of facial shapes and hair styles	the student will identify his facial shape and select a hair style	suitable for his facial contour
103.01.07	Given a list of proper personal grooming habits including: - essentials of body cleanliness - essentials of well-groomed hair - essentials of properly applied cosmetics - essentials of posture and figure problems - essentials of hand and nail care - essentials of dental care	the student will inventory his grooming habits and develop a personal grooming plan	appropriate for the individual student as determined by a student/teacher conference

Number	Condition	Performance	Standard
103.01.08	Given a list of health habits including: - essentials of physical exam - essentials of weight control - essentials of good nutrition - essentials of exercise - essentials of relaxation - importance of sleep	the student will analyze his health plan and, if necessary, develop a plan for good health	appropriate for the individual student as determined by a student/teacher conference
103.01.09	Given an inventory sheet on skin and complexion types	the student will analyze his skin problems and coloring and develop a plan for acceptable cleansing and, if appropriate, the application of cosmetics	suited to his type and coloring

Number	Instructional Ideas	Notes
103.02.01	The teacher should check the listings prepared by students for signs of low self-esteem or unrealistic appraisals. In an interview with student, stress the importance and possibility of improvement.	
103.02.02	Have a speaker from a modeling agency give a presentation on fashion, charm, and poise. If no modeling agency is available, ask a fashion buyer or a representative of an employment agency to speak to the class.	
103.02.03	Simulated stress situations are only partially effective. The real test of the teaching will come when the student regains composure when the situation is unexpected. A stress situation might be: 1. ripping a dress while on the job 2. staining a dress 3. duplicating ink on clothes	
103.02.04	Use panels of students to give the grooming policies of various types of businesses and discuss the importance of proper grooming. Ask personnel representatives of local companies to serve as a review panel.	
103.02.05	Invite representatives of businesses in the area to speak to the class.	
103.02.06	Help students develop the habits of good grooming by encouraging proper dress frequently at school.	
103.02.07	Students should be encouraged to follow their grooming plans. The teacher may need to tactfully discuss poor grooming habits with individual students.	
103.02.08	Make available a list of health habits, including examples of the essentials.	
103.02.09	Make available an inventory sheet on skin and complexion types.	

NOTE: The teacher should set an example of good grooming.

Number	Condition	Performance	Standard
104.01.01	Given three minutes and printed material containing all letters of the alphabet and at least sixty words	the student will copy into handwriting	judged to be legible based on the absence of the following factors: - uneven alignment - crowded letters/words - light/heavy line (pen) - improper formation - irregular slant - space between letters/words exceeding 1/8 inch
104.01.02	Given an oral business message including numbers	the student will write the message legibly, first in printing and then in cursive	to be read without difficulty by three persons and the instructor
104.01.03	Given a business form requiring handwritten carbon copies; i.e., voucher, invoice, receipt, money order, deposit form, petty cash slip, telephone memo, log, et al.	the student will complete the form	to be read on the carbon copy without difficulty by three persons and the instructor
104.01.04	Given an employment application requiring both printed and handwritten information	the student will follow directions and complete the application	to be read without difficulty by three persons and the instructor

Number | **Instructional Ideas** | **Notes**

104.02.01 Make a collection of samples of handwriting illustrating factors affecting legibility; have students identify factors.

Legibility is the prime objective in handwriting. Studies show that the single most important factor that affects legibility is letter formation. Good letter formation includes general shape, correct closures, and absence of needless flourishes.

Uniform slanting, a medium pen line, and alignment are important only as they affect letter formation. Excessive speed, a heavy grip, a heavy touch, excessive arm movements, inferior writing instruments, and a poor writing surface affect letter formation adversely.

Students may make overhead transparencies to illustrate good handwriting; i.e., the most used letters in English, or the "troublemakers," lower case t, r, e, a and capital D and I, etc.

Have students copy letters and numbers from samples of handwriting that illustrate excellent penmanship in both cursive and printing. With the use of diagonally lined paper, the student will be able to achieve correct slant.

Holographic (handwritten) wills are legal in California, so an attention-getting activity calls for each student to copy the will below in his own handwriting or make up a will of his own:

Your Town, California
Current month, day, year

I, Richard Roe, hereby make my last will. I will give all the property of which I am possessed, both real and personal, to my wife, Mary Roe. I appoint my wife executrix of this will without bond. I give her power to sell all or any of my estate without an order of court. I revoke all wills by me heretofore made. I declare this will is entirely written, dated, and signed by my hand.

Richard Roe

Number	Instructional ideas	Notes
104.02.01	(continued) Using the handwritten will as a sample, the student analyzes his handwriting for legibility according to the list of factors given in 104.01.01. Research indicates that the attention the student is giving to his writing should result in increased legibility of the second will.	
104.02.02	Samples of legible printing and cursive should be posted and praised. Sometimes "before" and "after" samples may be sent home with a congratulatory letter to parents.	
104.02.03	Regular carbon copies and carbonless sensitized paper may be used. If additional practice is desired, other forms from local business firms may be used.	
104.02.04	A bulletin board display may be made of the employment applications with the most legible handwriting.	
General:	Other activities students may perform include: A. Make notes for the next day's work; make notes on incoming mail; sign signature; take orders; keep appointments calendar; acknowledge/prepare invitations; write notes of condolence/congratulations. B. If a speaker is brought in from the post office to talk about mail, he may incorporate handwriting and the optical character reader. Many letters go to the dead letter office each year because the handwriting on the envelopes cannot be read.	

Number	Condition	Performance	Standard
105.01.01	Given 10 sets of incomplete and/or unclear instructions	the student will determine and list the missing element (or elements) in each set of instructions	for at least 9 of the 10 sets
105.01.02	Given a set of written instructions and 10 true/false statements relating to the performance described in the instructions	the student will indicate which statements are true and which are false	with at least 9 correct responses
105.01.03	Given 10 dictated addition problems, 10 dictated subtraction problems, and dictated instructions on what work is to be done	the student will follow the directions by recording the dictated numbers and the appropriate + or - signs	with directions correctly followed for at least 9 of the 10 problems (Evaluation is not on the accuracy of the addition and subtraction.)
105.01.04	Given a set of written instructions	the student will follow them to provide the information or to complete the activity requested	with no major deficiencies in the performance
105.01.05	Given oral instructions	the student will follow them to provide the information or to complete the activity requested	with no major deficiencies in the performance
105.01.06	Given a written set of instructions which requires the completion of a physical activity or action	the student will give the same instructions orally to 3 classmates who must in turn perform the required activity	with at least 2 of the 3 students satisfactorily completing the activity

Number **Instructional Ideas** **Notes**

105.02.01 The teacher may select instructions of approximately a sentence in length that do not appear to be clear and have the student rewrite them so that they are understandable.

Examples of some incorrect and incomplete instructions:

Assume you have sold an article and have been given money for it, indicate the correct amount of change.

Type the following on a ditto master and run copies.

105.02.02 Sources of instructions include:

- sets of instructions which come with major household appliances
- telephone directory
- instructions given on a federal income tax return
- instructions with standardized and civil service tests
- instructions found in the school student handbook
- local company manuals or handbooks

105.02.03 It is suggested in dictating these problems that they be read as follows:

Add twenty dollars and fifty cents, one dollar and ten cents, three dollars and four cents, etc.

Subtract nine dollars and fifty cents from thirty-five dollars and eight cents.

This forces the student to decide which numbers he will write first and what sign he will use.

105.02.04 Use the "scavenger hunt" method; for example:

You (the student) will find one sheet of bond paper, type your name on the upper right corner, locate a 10-key adding machine, do problem 5 on page 38 (in the 10-key instructional manual), tear off the tape and staple to the top of the bond paper, locate a large envelope, type your address on the envelope, use the center of the envelope and come down eleven lines from the top.

Number	Instructional Ideas	Notes
105.02.04	(continued) Have the student fill out an application blank following the instructions.	
105.02.05	After a school announcement has been read to the class, have the students respond to a series of questions; for example: We are having a double third period assembly today. All students whose third period classes meet in Rooms 30, 34, 41, and physical education will go to the first assembly; all others will go to the second assembly.	
105.02.06	Give a student a set of written instructions on how to change the ribbon on a manual typewriter. He will give the same instructions orally to three other students who must perform the activity.	

Number	Condition	Performance	Standard
106.01.01	Given a list of 25 words, and phrases, commonly used on employment forms and in test instructions and a list of definitions	the student will match the words/phrases to the definitions	with at least 20 correct responses
106.01.02	Given an application form for a Social Security Number	the student will indicate his Social Security Number or complete the application form	legibly, correctly, and completely
106.01.03	Given an Employees Withholding Exemption Form (W-4)	the student will type or print the required information	legibly, correctly, and completely
106.01.04	Given a sample employment test	the student will complete the test	- with a follow-up meeting with the teacher to discuss results and implications or - with the score or percent of accuracy that is necessary to meet the minimum employment requirements
106.01.05	Given a sample personal data sheet as a guide and any necessary personal information	the student will prepare and have typed his own personal data sheet including personal information, education, employment experience, activities, and references	accurately and in an acceptable format
106.01.06	Given a blind want ad requiring a letter of application and sample application letters	the student will write an application letter	- that is original - conveys the appropriate message - meets standards of mailability (neatness, style, vocabulary, spelling, punctuation)

Number	Condition	Performance	Standard
106.01.07	Given application blanks from 3 companies and his personal data sheet	the student will fill out each application form	completely, accurately, and legibly with - typewritten or printed in ink responses - all questions acknowledged - all errors corrected - legal signature
106.01.08	Given a list of questions frequently asked by personnel officers in an interview	the student will type, write or respond orally to the questions	to the satisfaction of a majority of a panel of students and/or the teacher
106.01.09	Given a role-playing situation in which the student is a job applicant and the teacher is a prospective employer	the student will make an appointment by telephone (if possible) and/or in person and/or make an appointment	satisfying the criteria recommended on the California DECA rating sheet
106.01.10	Given the opportunity to participate in an interview with a local employer (or a teacher)	the student will do so	at the appointed time and then meet with his teacher to discuss his strengths and weaknesses as indicated on the employment interview sheet completed by the interviewer
106.01.11	Given a sample follow-up letter after having completed an interview	the student will write and mail a similar letter to the interviewer	which conveys the appropriate message and meets standards of mailability (neatness, style, vocabulary, spelling, punctuation)

NOTE: Although the following objectives do not directly relate to Job Application, beginning employees should have met them.

Number	Condition	Performance	Standard
106.01.12	Given a payroll voucher	the student will define orally or in writing: Gross Pay, Net Pay, Federal Withholding Tax, State Withholding Tax, FICA, and SDI	with at least 5 of the 6 terms defined accurately
106.01.13	Given a payroll voucher	the student will list at least 3 deductions that could be made under the heading "Other Deductions"	with 100% accuracy
106.01.14	Given two sample payroll checks	the student will write in ink a blank and a restrictive endorsement	with 100% accuracy

Number	Instructional Ideas	Notes
106.02.01	Type or write 50 words on one side and definitions on opposite side of an index card. Students will use the cards as flash cards to learn the words and definitions.	
106.02.02- 106.02.03	Utilize large or small group presentation and discussion of Social Security Form and W-4 Form--using the transparencies, overhead projector, and/or duplicated sample forms. Individualized learning activity--the student uses cassettes, slides, transparencies and fills out duplicated sample forms. Utilize as a resource person an employee of a governmental agency involved in hiring personnel.	
106.02.04	The following activities are designed to familiarize the students with employment testing: a. Collect practice tests and related forms for student review. b. Counselors can speak to the class on the importance of taking tests. c. Employment agency representative, personnel manager, or a local employer can explain his testing procedures. d. Have students take several employment tests. e. Use Civil Service sample tests.	
106.02.05	Teacher prepared transparencies and/or duplicated samples of various formats for data sheets may be used. Provide students with a list of words commonly used in writing a data sheet and discuss the meaning of these words and phrases. Duplicate a list of commonly used terms and record explanations of the words. Have students brainstorm about information that an employer might want to consider about an applicant. Ask students to gather all needed personal information and prepare their own data sheets.	

Number Instructional Ideas Notes

106.02.06 Ask students to collect application blanks from various companies.

Have students compare the application forms to become familiar with the usual types of information requested.

Display collection of application blanks on the bulletin board.

Provide students with a list of words commonly used on application blanks and discuss the meaning of these words.

Ask a personnel manager to discuss the importance of filling out application blanks accurately and neatly.

106.02.07 A list of questions may be compiled based on some typical questions asked in an interview; such as:

a. Why do you want to work for_______________company?
b. What can you contribute to the company?
c. What kind of work would interest you most and why?
d. What do you know about the company?
e. What salary do you want?
f. Where do you want to be 5 years from now?
g. What are your extracurricular activities?
h. Do you have any questions about the company?
i. Why do you think you are qualified for this job?
j. Why did you leave your last job?

106.02.09 Predetermine through discussion with employers what they consider important in an interview and what they consider to be proper grooming.

Ask the students to discuss:
a. factors that hinder or help in an interview
b. data and supplies to bring to the job interview
c. case studies of interviews for employment
d. job descriptions and student perception of role

Number Instructional Ideas Notes

106.02.09 (continued)

Seek resource persons to lead class discussions. (A former student to tell about his experiences in obtaining a job; a person to present a company viewpoint; a personnel manager to discuss common mistakes made during an interview)

Ask students to look at employment rating sheets used by local personnel offices for the rating of their applicants during an interview.

Ask students to listen to role-playing situations on cassettes.

Have students participate in an interview at least once a year conducted by a local employer or a qualified teacher. Videotape and/or magnetic tape may be used to record interview for review session.

General: A. Have students prepare a folder containing the following forms pertaining to job applications:
1. Personal data sheet
2. Application blank
3. Sample employment tests
4. Copy of employment rating sheet
5. Copy of follow-up letter to interviewer

B. Ask graduating seniors to give a copy of a current personal data sheet to the department chairman to be used as a source reference by the placement officer. Materials should be returned to the department for follow-up purposes.

ARE YOU A GOOD JOB HUNTER?

Walter Duckat, who prepared this quiz to help job seekers, has personally counseled more than 10,000 employment hunters in the past 25 years.

He is director of the Guidance Division of the Federation Employment and Guidance Service, a nonprofit, nonsectarian organization which advises both young people and adults, from high school dropouts to top executives, on the problems of finding employment. Mr. Duckat has also written extensively on the subject.

Although he is a psychologist and is entitled to call himself "Dr.," he prefers the plain "Mr." because clients are more at ease than if they thought him a psychologist.

EVEN IF YOU ARE NOT SEEKING A JOB NOW, TEST YOUR KNOWLEDGE OF JOB FINDING BY ANSWERING THE FOLLOWING QUESTIONS. THEN TURN THE PAGE FOR YOUR SCORE AND ANALYSIS.

1. When seeking a new post, does it usually matter whether you are currently employed?
Yes__________ No__________ Uncertain__________

2. When seeking employment, is it usually wisest to tell only prospective employers that you are unemployed?
Yes__________ No__________ Uncertain__________

3. If you happen to be in economic straits, should you inform the prospective employers that you are unemployed?
Yes__________ No__________ Uncertain__________

4. Do you believe the way you dress can influence the outcome of an interview?
Yes__________ No__________ Uncertain__________

5. When greeting the prospective employer, should you extend your hand first?
Yes__________ No__________ Uncertain__________

6. If on your previous jobs you had been praised for some meritorious work you had done, should you mention it?
Yes__________ No__________ Uncertain__________

7. Should one who is uncomfortable during interviews try to rehearse in advance what he will probably be asked?
Yes__________ No__________ Uncertain__________

ARE YOU A GOOD JOB HUNTER? (continued)

8. If there are moments of silence during the interview, should you try to "make" conversation?
Yes__________ No__________ Uncertain__________

9. If the employer doesn't ask you, should you volunteer reasons why you may wish to work for him?
Yes__________ No__________ Uncertain__________

10. Is it usually desirable to bring with you a resume of your training and experience?
Yes__________ No__________ Uncertain__________

11. Is it prudent to ask the employer about his firm and its policies?
Yes__________ No__________ Uncertain__________

12. If the employer fails to mention the salary offered, should you ask him?
Yes__________ No__________ Uncertain__________

13. If you have friends working for the organization for a number of years, should you tell this to the employer?
Yes__________ No__________ Uncertain__________

14. If the employer asks you what salary you expect and you do not wish to quote either too low or too high a figure should you give him a precise figure?
Yes__________ No__________ Uncertain__________

15. If among the reasons you left your former job were some that were uncomplimentary to the employer, should you give full account of these to the prospective employer?
Yes__________ No__________ Uncertain__________

16. After your interview, would you send a follow-up letter of thanks to the prospective employer?
Yes__________ No__________ Uncertain__________

Answers to Questions in Test on Preceding Pages

1. Yes. You're usually in a more strategic bargaining position when you are employed than when unemployed.

2. No. Unemployment is no disgrace. The more people who know about your availability, the greater your chances of obtaining a job.

3. No. The employer is not a social worker or a clergyman. This information may tempt him to offer you a lower salary.

4. Yes. You'll want to look presentable but there is no need to look overdressed. Many job opportunities have been ruined because the prospective employee does not dress appropriately.

5. No. Wait for him to do so. Some employers do not like to shake hands.

6. Yes. It would be foolish not to do so. Employers are interested in knowing whether you may be an asset.

7. Yes. Most employers request basic information regarding training and experience which may be rehearsed so as to avoid a stumbling manner.

8. No. This isn't a social engagement. The employer should dominate the proceedings.

9. Yes. Your show of interest may strengthen your appeal to him.

10. Yes. It's businesslike and gives you greater opportunity to emphasize your good points than the usual application form.

11. Yes. It shows alertness and interest.

12. Yes. It's legitimate. Besides, if his offer is too low you may not be interested in it.

13. Yes. Many firms prefer to hire friends or acquaintances of employees on the assumption that they will recommend only qualified persons.

14. No. Better to say you'll accept the prevailing pay and it's the opportunity you seek.

15. No. Many employers may fear that you are an agitator if you denounce your former employer.

16. Yes. It shows good manners and it may add to the good impression you made.

Answers to Questions in Test on Preceding Pages (continued)

Give yourself 4 points for each correct answer, 2 points for each answer of Uncertain, and 1 point for each wrong answer.

YOUR SCORE__________

Your Analysis

50-64	This score ranges from above average to superior. If you put your job hunting knowledge into practice, you should have no trouble with unemployment.
28-49	This is an average score. You should do reasonably well at job interviews but might strengthen your job hunting chances by noticing your weak points (questions you answered wrong).
16-27	Below average score. Greater attention paid to the points discussed in this test may help you stay out of the unemployment line in the future.

INTERVIEWER'S WORK SHEET

In the particular business where you have applied for a position, the following qualities and characteristics are carefully checked on an interviewer's work sheet by the Personnel Department:

APPEARANCE: neat, well groomed, slovenly, average build, thin, stout, tall, short.

DRESS: good taste, worn, careless, flashy, untidy.

POSTURE: well balanced, very erect, slightly relaxed, slightly stooped, round shouldered.

FACIAL EXPRESSION: radiant, happy, thoughtful, solemn, sullen.

HANDS AND FACE: healthy looking, well cared for, physical impairment, heavy makeup, blemished, dirty.

APPROACH: poised, alert, forward, timid,awkward.

VOLUME OF VOICE: too loud, easily audible, too low, pleasant, shrill, monotone.

ENUNCIATION: very clear, clear, passable, indistinct, omits syllables.

PRONUNCIATION: faultless, occasional mistakes, frequent mistakes.

GRAMMAR: faultless, occasional mistakes, frequent mistakes, bad grammar, extremely bad grammar.

PERSONALITY: magnetic, animated, pleasant, tactless, sullen.

TEMPERAMENT: calm, confident, shy, excitable, phlegmatic, sullen.

KNOWLEDGE: clear perception, good comprehension, shrewd, understanding, uninformed, ignorant.

ATTITUDE: cooperative, enthusiastic, attentive, indifferent, arbitrary, argumentative.

SELF-OPINION: modest, confident, timid, self-assured, conceited.

INTEREST IN POSITION: exceptional, normal, below average.

INTERVIEWER'S WORK SHEET (continued)

SUMMARY: superior, above average, average, below average.

RECOMMEND EMPLOYMENT yes_ no_

COMMENTS:

Prepare a neat interviewer's work sheet listing all of these items; then rate yourself as you think the interviewer would rate you.

COMMON CORE MAKING CHANGE COMPETENCY 107

Number	Condition	Performance	Standard
107.01.01	Given a cash box, a change fund, and a cash report form	the student will count the cash by denomination and complete a cash report form	with 100% accuracy
107.01.02	Given a change fund and descriptions of cash transactions	the student will give change for each transaction	with 100% accuracy
107.01.03	Given the conditions described in the two objectives above and a proof of cash form	the student will fill out the proof of cash form, balancing the total cash received with the cash box total	with no overage or shortage

Number	Instructional Ideas	Notes
107.02.01	Locate play money, both currency and coins, for change handling practice. Most teachers find that the responsibilities for safeguarding and providing cash each class period is too great.	
107.02.02	A suggested time standard for this competency is the successful completion of 4 transactions in a minute. Demonstrate how to crumple new bills so that two bills are not given to a customer in error. Emphasize placing tendered money on the change place until the transaction is completed. Emphasize the importance of calling out the change returned to a customer.	
107.02.03	Develop mockups or overhead transparencies of various forms for proof of cash.	
General:	A. Contact a bank representative or a member of the police force who has expertise and have him demonstrate marked bills or counterfeit money. They can also tell of the change bluffers who confuse or distract cash handlers. B. Provide resource people who can explain the importance of company policy regarding: 1. dishonesty 2. falsification of records 3. carelessness in handling money (excessive and consistent overages or shortages of money) 4. failure to record a transaction or to issue a receipt 5. unauthorized borrowing or lending of company funds C. School cafeterias and snackbars have personnel who can demonstrate before the class or to small groups how to sort money with a mechanical sorter, wrap, count, and complete a daily cash summary.	

Number	Condition	Performance	Standard
108.01.01	Given 10 problems with each problem containing no more than 6 items composed of two to five digits, paper, and pencil	the student will add whole numbers	with 80% accuracy
108.01.02	Given 10 problems with each number containing between two and five digits, paper, and pencil	the student will subtract whole numbers	with 80% accuracy
108.01.03	Given 10 problems with each number containing three digits or less, paper, and pencil	the student will multiply whole numbers	with 80% accuracy
108.01.04	Given 10 problems with each divisor containing no more than two digits and each dividend containing no more than five digits, paper, and pencil	the student will divide whole numbers	with 80% accuracy
108.01.05	Given 5 problems for each operation with no more than three digits to the right of the decimal point, paper, and pencil	the student will add, subtract, multiply, and divide decimals as described in the four objectives above	with 80% accuracy
108.01.06	Given 10 problems, paper, and pencil	the student will convert common fractions to decimals with a maximum of two digits to the right of the decimal point (Common fractions are defined as 1/2, 1/3, 1/4, 1/5, and 1/10, or any multiple of these, such as 2/3, 3/4, 4/8, 6/10, etc.)	with 80% accuracy
108.01.07	Given 10 problems, paper, and pencil	the student will reduce common fractions to lowest terms	with 70% accuracy

Number	Condition	Performance	Standard
108.01.08	Given 5 problems for each operation with each problem containing no more than 6 items, paper, and pencil	the student will add, subtract, multiply, and divide common fractions	with 70% accuracy
108.01.09	Given 10 problems, paper, and pencil (Refer to the conditions of objectives 108.01.01 through 108.01.05 for restrictions on the size of problems and objective 108.01.06 for the definition of common fractions.)	the student will add, subtract, multiply, and divide using any combination of whole numbers, decimals, and common fractions	with 70% accuracy
108.01.10	Given 10 problems, paper, and pencil	the student will round off decimals to one, two, or three places	with 80% accuracy
108.01.11	Given 10 problems, paper, pencil, and a conversion table	the student will convert fractions to decimals and decimals to fractions	with 90% accuracy
108.01.12	Given 10 situations requiring counting (either lists or groups of objects) with each list or group containing 10 to 100 items, paper, and pencil	the student will count and record the items	with 90% accuracy
108.01.13	Given 10 problems, paper, pencil, a sales tax table, postal rate tables, and/or payroll deduction tables	the student will read and record information from the tables	with 90% accuracy
108.01.14	Given 10 problems, paper, and pencil	the student will convert from percent to decimal and decimal to percent	with 90% accuracy

Number	Condition	Performance	Standard
108.01.15	Given 10 problems, paper, and pencil	the student will multiply and divide basic percentage problems	with 70% accuracy
108.01.16	Given 10 problems, paper, pencil, and common measuring tools (such as ruler and yardstick)	the student will measure and record the measurements of physical objects to the nearest 1/4 inch	with 90% accuracy
108.01.17	Given 10 problems requiring the weighing of physical objects and the recording of these weights, paper, pencil, and scale	the student will weigh the objects and record their weight to the nearest unit for the particular scale used	with 80% accuracy

Number **Instructional Ideas** **Notes**

108.02.01-
108.02.02 Use the number line to teach the operations of addition and subtraction. For example:

```
4 + 1 = 5
                                -----
--------------------
0----1----2----3----4----5----6----7----8----9----10
```

Use the addition method for teaching subtraction.

108.02.05
&
108.02.06
&
108.02.15 To get across the equivalency relationship between common fractions, percents, and decimals, make wall charts to be posted in the room. On them, put the equivalency relationships such as:

1/2 = .5 = 50%

After a period of time, remove the charts so that they don't become a permanent crutch.

Also make these charts using monetary values, such as:

1/2 dollar = 50 cents = 50% of one dollar.

108.02.15 Relate percent problems to student experience whenever possible. Teach percent problems as a sentence.

Examples: What is 16% of 240?

Replace is with =, and of with x.

What = 16% X 240?

? = .16 X 240

etc.

Number | Instructional Ideas | Notes

108.02.15 (continued)

A senior boy dated 9 girls in his class. If there are 16 girls in the class, what percent did he date?

The question is: What percent of 16 is 9?

? X 16 = 9

? = 9/16

etc.

If there are 17 boys in your class and this is 47% of the class, how many students are in the class?

The question is: 47% of what number of students is 17?

.47 X ? = 17

? = 17/.47

etc.

If 72% of your class plan to attend the Junior Prom, how many will attend? There are 31 students in the class.

The question is: 72% of 31 is how many students?

.72 X 31 = ?

etc.

Number | Instructional Ideas | Notes

General:

A. Use diagnostic tests to determine the student's present mathematical skills. Then give him work in his areas of deficiency--don't waste student and teacher time trying to teach him something he already knows. Allow the student to challenge those units where he feels that he can pass the post test without instruction.

B. Send students to the chalkboard to work problems. The entire group should be at the board. The teacher can tell at a glance who needs extra help. Either the teacher or another student may give the extra help. Once they get used to this method, it is generally popular with students.

C. Use catalogs from Sears, Penneys, Wards, or any other catalog that is available.

D. Get measuring tools such as yardsticks and tape measures so that students can measure the rooms to determine the dimensions.

E. Use maps and travel brochures. Get information from travel bureaus and the chamber of commerce.

F. Use individual projects. The number and kinds of individual projects that can be designed and used is limited only by the teacher's imagination. The teacher can make them as simple or as complicated as he feels is necessary for his particular situation. They may be short, one-period projects or longer. A few examples are:

1. Plan and determine the cost of:
    - a. installing a new floor in the classroom by using either tile or carpet
    - b. repainting the classroom
    - c. installing a new ceiling--acoustical tile or any material the teacher specifies
    - d. complete redecorating of a single room--school or home

Number | Instructional Ideas | Notes

General: F. (continued)

1. (continued)
    - e. pouring new sidewalks around the school
    - f. the purchase of a complete wardrobe from a catalog, including the figuring of shipping costs and sales tax
    - g. planting or replanting a lawn
    - h. furnishing a 2- or 3-bedroom home
    - i. borrowing on different types of loans and relate this to some physical object whenever possible
    - j. the purchase of a car, new or used, including shopping for interest rates and loans
    - k. a vacation trip, including
        - cost of food
        - cost of lodging
        - cost of travel
        - cost of recreation
        - total and daily budgets
2. Fill out income tax returns. Just the short form, 1040A, would be sufficient.
3. Use an investment project.

   Your teacher, __________, has just won $1,000,000 in the Irish Sweepstakes. He has decided to share his good fortune with you. He is giving each of you $10,000 with the stipulation that it be used as follows:
    - a. You must invest it in at least three different stocks listed on the New York Stock Exchange.
    - b. The remainder of the $10,000 (maximum $200) not invested must be placed in the bank at 4% interest.
    - c. The broker's fee for handling your transactions will be 2%, both when you buy and when you sell.
    - d. You may buy or sell stock at your own discretion as long as you maintain stock in at least three different companies at all times.
    - e. The record of your shrewd financial dealings will be kept in a notebook. The notebook will contain the following information:

Number **Instructional Ideas** **Notes**

General: F. (continued)

3. (continued)

e. (continued)

- a table of contents
- the name of each company and a short description of what it does
- any information that you may be able to obtain on the stock of each company or on the company itself--such as newspaper clippings, a pending stock split or merger, Senate hearings, etc.
- your reasons for investing in each company
- the amount of profit or loss made on each stock during the project
- a weekly chart (graph) of the price fluctuations of each stock
- on the day that you buy, and on the day that you sell, you will cut the appropriate section for each stock from the financial page of a newspaper and glue it to the graph of that stock
- figure the dividend yield for each stock at the time of purchase
- at the end of the project, you will be required to account for the full $10,000 and you must show total profits or total losses, whichever the case may be.

f. For extra credit, you may write directly to the companies and obtain materials such as annual reports.

This project should run at least two months. After allowing time for initial setup, the teacher may go on to other subject matter allowing one period per week to work on the project.

One suggestion for more student involvement is to assign one student per each five in the class as a stockbroker. The broker must give advice and recommendations and maintain a diary.

Number Instructional Ideas Notes

General: F. (continued)
3. (continued)
f. (continued)

The use of play money adds interest. Each student is given $[illegible],000 in play money and must actually pay his broker when he purchases stock.

This project is usually very successful because it has high interest appeal to students. It is also successful from the teacher's standpoint because it brings so many skills together in one assignment.

G. Use workbooks, practice sets, students as tutors, and/or paid or volunteer teacher aides.

H. The teacher could take commercially prepared filmstrips and make his own tape presentations to go with them, or take commercially prepared tapes and make his own slides to go with them.

Also, make taped presentations to go with classroom transparency sets so that they may be used individually. Single concept presentations of this type allow the student to review a concept as often as he needs.

I. Use simulations such as a bank or a store.

Set up projects on a point system and issue payroll checks and vouchers, with all necessary payroll deductions, in payment for these points. This works very well with a simulated bank. Work on reading and understanding the payroll voucher.

J. Math games and puzzles to teach concepts and add interest and variety to the mathematics program are a motivational tool because they make math fun for the student.

Number **Instructional Ideas** **Notes**

General:

K. Use programmed materials.

L. Use adding machines and calculators. The adding machine can be a great motivational tool if used properly. The flowcharting used in the commercially prepared courses can help the student to understand the order of operations used in working a problem. The use of flowcharting without using machines can also be very successful. Another method would be to allow students to check their work on the machine after they have completed the work manually.

Refer to Competency 101, Adding Machine--Common Core.

M. Set up a mathematics lab in cooperation with the mathematics department. Math labs involve hands-on operation and experiments with physical objects. They may be highly structured or open-ended.

N. Use computer-assisted instruction. Programs on basic math skills have been designed commercially for use with a computer.

O. Use newspaper advertisements and develop problems using the information in the ads.

P. Use road maps for practice in addition, subtraction, and measurement.

Q. Have students convert recipes for more or fewer servings. Whenever possible, use recipe to prepare an item. Ask the home economics department for cooperation on this.

R. Use reguler or sample employment tests when testing mathematics skills. Contact local employers for employment tests.

S. Use materials designed for the low achiever in mathematics.

Number	Condition	Performance	Standard
109.01.01	Given a list of topics or a role-playing situation	the student will converse spontaneously with another student using standard pronunciation, diction, vocabulary, and grammar	with a satisfactory rating by the majority of observers
109.01.02	Given a 3-minute listening opportunity	the student will demonstrate his listening skill by answering related objective questions	with 80% accuracy
109.01.03	Given a job task or problem	the student will answer questions, ask questions, or make requests appropriate to the situation	to the satisfaction of the teacher

Instructional Ideas

Notes

General:

A. Have the students draw each other's names from a box, then learn as much about that person as possible in 10 minutes. Allow two minutes for each student to introduce the person whose name they drew.

B. Have each student introduce another student as though he were a famous person, giving a brief biography of his accomplishments and interests.

C. Have students select a single topic to demonstrate something that requires a clear explanation. These topics might include: wrap a package, mount a picture on a bulletin board, find a word in a dictionary, address an envelope, operate business office equipment, etc. Also see Competency 105, Instructions -- Common Core.

D. Use tongue twisters to emphasize the importance of enunciation skills.

E. Informal speaking presentations can be made about store and office problems involved in selected case studies. These presentations can involve individual, group, or panel discussions.

F. Have students practice telling stories in groups of 3 to 5. Type words on cards that will express an idea or descriptive episode by following the sequence in which they are written (bubble gum, boy, principal, custodian). The student telling the story should be able to elicit questions, signs of interest, and attentiveness from his listeners.

G. Have students read selections that illustrate "mood." These selections should connotate in a sentence or two--a happy voice, a tired voice, an angry voice, or a self-pitying voice. A variation of this technique requires that the speaker stand out of view.

H. See Common Core Competencies on Instructions, Telephone, and Working with People.

Number	Condition	Performance	Standard
110.01.01	Given 10 common reference questions	the student will identify those which can be answered by referring to a standard dictionary	with 90% accuracy
110.01.02	Given a current standard dictionary and a list of 20 words, some of which are misspelled	the student will write the proper spelling, definition, and syllabication	with 90% accuracy
110.01.03	Given a current standard dictionary and 10 abbreviations	the student will spell them out	accurately
110.01.04	Given the local telephone directory and the names of 5 California and 5 out-of-state cities	the student will locate and list the area code and rate for a daytime, 3-minute person-to-person call to each city	accurately
110.01.05	Given the local telephone directory and the following list: - Police Department - Fire Department - A hospital - Department of Human Resources - Directory Assistance	the student will locate and list the correct telephone number for each	accurately

Number	Condition	Performance	Standard
110.01.06	Given the local telephone directory containing both alphabetic and classified listings and lists of names or items as follows:	the student will:	accurately
	- 5 names of people	a. locate and list the telephone numbers and addresses for these names	
	- 5 names of business firms	b. locate and list the telephone numbers for these firms	
	- Names of 5 products, brand names and/or services	c. locate and list the firm names and telephone numbers of businesses handling these items or services	
	- A list of 5 local cities or towns	d. identify the Zip Code for each city	
110.01.07	Given a city directory and 5 products or services	the student will list from the "Buyers Guide" section of the directory the name and address of a business firm providing each product or service	accurately
110.01.08	Given a city directory and 3 names	list from the "Alphabetical List of Names" section the address of each, noting the page number where found	accurately
110.01.09	Given the National Zip Code Directory and a list of the addresses of 10 firms in 5 different cities	the student will list the Zip Code for each address	accurately
110.01.10	Given a company telephone directory and the names of 5 offices	the student will list the extension number for each office	accurately

Number	Condition	Performance	Standard
110.01.11	Given a company employee handbook or manual	the student will: a. list 3 facts about the company and its employees, noting the page where found b. list 3 fringe benefits offered by the company c. list 3 company policies and/or rules	accurately
110.01.12	Given: - equipment and/or supply catalog - a purchase order - a list of 5 items to be ordered	the student will prepare the purchase order for the items listed	accurately
110.01.13	Given: - a California road map - a city or county map - a list of 10 cities - a list of 5 local firms	the student will: a. list the U. S. Highways leading into the cities b. write directions to go from school to each firm	accurately by the shortest route

Number	Instructional Ideas	Notes
110.02.01	Give a slide presentation on the most efficient way to use the dictionary. Have students compare various dictionaries.	
110.02.04	Conduct contests based on finding the telephone numbers for a group of business firms.	
110.02.06	Prepare a tape with someone out of the department asking for information which would require the use of: a. the telephone book b. a company telephone book c. the city directory Have small group discussions on the reasons and advantages of having the different sections in the telephone book. Invite a representative from the telephone company to serve as a resource person on the correct use of the telephone directory.	
110.02.10- 110.02.11	Invite a representative from a local business to discuss his company's handbook or manual. The students may establish a simulated company and develop a company manual. Some information in company publications may be of a confidential nature; therefore, these must not be used without permission and even then with great care.	
110.02.12	Invite a purchasing agent to speak about the use of equipment and supply catalogs. Use equipment and/or supply catalogs as a basis for math problems. Discarded catalogs may be available from purchasing departments or suppliers.	

Number	Instructional Ideas	Notes
110.02.13	Invite an auto club or a California Highway Patrol representative to demonstrate the use of maps. Road maps may be obtained from the major oil companies; city maps, from the local chamber of commerce or city government office and auto clubs.	

Number	Condition	Performance	Standard
111.01.01	Given simulated telephone calls and telephone message forms	the student will record the pertinent information in the proper places on the form	legibly and accurately
111.01.02	Given primary data (sales receipts) and a secondary form (tally sheet)	the student will select the proper column, record, tally and/or balance data	legibly and accurately
111.01.03	Given a bank deposit slip and the necessary data or source documents	the student will complete the bank deposit slip	legibly and accurately
111.01.04	Given an inventory control sheet, tally of inventory on hand, and requisition form	the student will determine the number of items to be reordered and complete the requisition form	legibly and accurately

Number	Instructional Ideas	Notes
111.02.02	Examples of primary data being recorded onto a secondary form would be types of sales (credit, cash, lay-a-way) copied from invoices or sales receipts onto a weekly sales sheet. Telephone charge calls or long distance calls are often recorded on a telephone charge sheet. Payroll card data is transferred to a payroll record.	
General:	A. Reproduce the teacher's copy of completed forms onto overhead transparencies. Students may verify the accuracy of their completed forms by switching on the projector (or use the mimeoscope) to read the image. B. Trace onto butcher paper a flowchart of record keeping transactions that can be attached to the wall. It can be used as a teaching visual, review visual, or as a visual which a student can use to explain the flow of transactions to other students or to the teacher. C. Emphasize the relationship of printing, writing, or numbering in proportion to the space available on a form by arranging a bulletin board display model. These models can be sketched or enlarged, or copies prepared by students can be mounted on the bulletin board. D. Guides for filling out business records are found in office manuals. These show flowcharts of activities and responsibilities from which mockups or transparencies can be developed. Some record keeping or accounting texts have visuals. E. To reinforce handwriting legibility, exchange papers of prepared forms, messages, etc., and have the students judge them.	

Number	Condition	Performance	Standard
112.01.01	Given 30 cards or documents, or a list simulating them, and instructions to match and sort by number, letter, or color	the student will match and sort	with no more than 3 items out of place
112.01.02	Given: - 30 pieces of source data, some in handwriting, or a list simulating them - a business form to which the source data has been transferred	the student will check and compare NAMES in the source data with NAMES on the form to which they have been transferred, to verify for accuracy and omissions	with no more than 3 errors
112.01.03	Given: - 30 pieces of source data, some in handwriting, or a list simulating them - a business form to which the source data has been transferred	the student will check and compare NUMBERS in the source data with NUMBERS on the form to which they have been transferred, to verify for accuracy and omissions (including totals)	with no more than 3 errors
112.01.04	Given: - 30 pieces of source data, some in handwriting, or a list simulating them - a business form to which the source data has been transferred	the student will check and compare NAMES and NUMBERS in the source data with NAMES and NUMBERS on the form to which they have been transferred, to verify for accuracy and omissions (including totals)	with no more than 3 errors
112.01.05	Given 15 handwritten names and 15 handwritten numbers, and instructions to copy them in a specific order	the student will copy them in handwriting, then read back with another student, making notations of needed corrections	with no undiscovered errors
112.01.06	Given 30 items and instructions to sort alphabetically	the student will perform the task	with no more than 3 items out of place.

Instructional Ideas

Notes

General:

A. Research studies indicate that the majority of office and distributive employees sort, check, and verify statistical records, typed copy, personal history documents, and other forms for completeness or conformance to expected standards, or to determine similarities and differences. To perform these tasks, the worker needs accuracy, visual acuity, concentration, reading and arithmetic skills, and knowledge of company standards and policies.

For this reason, it is recommended that as many of the classroom activities as possible be "hands-on" operations. Collect file cards, adding machine tapes, cash register receipts, and papers from students and local business firms for checking and verifying. Various colors of paper, various sizes of documents, reply envelopes, etc., can be used for sorting and matching.

Civil Service preparation booklets offer many name and number comparison drills.

B. When checking, students should use a card or a ruler as a guide to follow copy, holding the pencil in the writing hand and making check marks after items as they are verified. Read 2948 as two-nine-four-eight. Read 0 (the number) as "oh." Read the decimal point as point. Read .00032 as point-oh-oh-oh-three-two. Read down columns, not up or across. Verify any totals by addition to double check the source document.

C. See Common Core Competencies--Adding Machine, Simple Business Records
See Office Core Competency--Filing and Retrieving

Number	Condition	Performance	Standard
113.01.01	Given orally 50 common words encompassing the following: - pronunciation - "ie" or "ei" - changing "y" to "i" - dropping final "e" before suffix - doubling consonant before suffix - apostrophes	the student will write, type, or orally spell the words	with 70% accuracy

Instructional Ideas

Notes

After diagnosing a student's error patterns, have him complete appropriate remedial exercises. Don't waste his time by giving him unnecessary assignments.

In order to discover grade-level scores and/or obtain an error analysis use standardized tests: A. L. Lincoln, LINCOLN DIAGNOSTIC SPELLING TEST, Educational Records Bureau, New York; WIDE RANGE ACHIEVEMENT TEST (2 forms); NATIONAL ACHIEVEMENT SPELLING TESTS (4 forms); and BUCKINGHAM EXTENSION OF AYRES SPELLING SCALE

By testing orally and by the use of flash cards, determine if the student learns more quickly through hearing or seeing.

In order to diagnose the student's learning preference, make up eight words for each group within the following categories:

Auditory -Vocal: Give the student orally 8 words and have him spell each one orally. Words are not presented visually.

Auditory-Motor: Give 8 words aloud and have him write each word on paper.

Visual-Vocal: Give 8 words on flash cards and identify. (i.e., "This word is carpet.") Student looks at the word and spells it orally to teacher.

Visual-Motor: Word is presented visually on flash card and identified. Student writes it on paper.

Multi-sensory Combination: Give 8 words on flash cards and spell each aloud. Student writes word and spells it orally after each word is given.

This device may be especially successful for a student with learning disabilities. For more information on the sensory method, see Westerman, SPELLING AND WRITING, Dimensions Publishing Co., San Rafael, CA, pp. 39-45. Also see Taschow, USING THE VISUAL-AUDITORY-KINESTHETIC-TACTILE TECHNIQUE TO SOLVE SPELLING PROBLEMS IN ELEMENTARY AND SECONDARY CLASSROOMS, ERIC No. 046 668, December, 1970.

Number	Condition	Performance	Standard
114.01.01	Given typical business telephone situations	the student will make spontaneous verbal responses	earning a score of "pass" on at least 90% of the items on a checklist covering voice, word usage, personality, and courtesy on the telephone
114.01.02	Given incoming local business telephone calls including: - calls the student can complete himself - calls during which he takes a message for another person - calls he must refer to another person - calls he must hold for another person - calls that are wrong numbers	the student will answer, develop, and close the calls	earning a score of "pass" on at least 90% of the items on a checklist
114.01.03	Given requests to make outgoing local business calls on dial telephones: - directly or through a switchboard - on a standard or coin phone - with or without a phone number given	the student will complete the calls: a. using coins if necessary b. using directory assistance if necessary c. dialing d. leaving message if the party called is not available e. developing the call if the party called is there f. closing the call	earning a score of "pass" on at least 90% of the items on a checklist

Number	Condition	Performance	Standard
114.01.04	Given incoming local business calls on a pushbutton phone with up to 6 buttons	the student will complete the calls: a. answering the ringing line b. identifying the office called c. developing the call d. using the hold button if other calls come in on other lines or if calls must be transferred e. closing the call	earning a score of "pass" on at least 90% of the items on a checklist
114.01.05	Given outgoing local business calls on a pushbutton phone with up to 6 buttons	the student will complete the calls: a. selecting a trunk line not in use b. using the hold button if other calls come in or if calls must be transferred c. developing the call d. closing the call	earning a score of "pass" on at least 90% of the items on a checklist
114.01.06	Given incoming long distance business calls, including: - person-to-person - station-to-station - direct or through a switchboard	the student will answer, develop, and close the calls	earning a score of "pass" on at least 90% of the items on a checklist

Number	Condition	Performance	Standard
114.01.07	Given requests to make outgoing long distance business calls: - direct or through a switchboard - on a standard or coin phone - with or without the phone number given - telephone operator assisted station-to-station or person-to-person calls - with or without a credit card	the student will complete the calls: a. checking the time of day b. using directory assistance if necessary c. using coins or credit card if necessary d. dialing or using operator assistance e. leaving message if the party is not available f. developing the call if the party called is in g. closing the call h. making a record of the date, the caller, the person and number called, the time and the charges for the call	earning a score of "pass" on at least 90% of the items on a checklist

Instructional Ideas

Notes

General:

A. Role playing of realistic business telephoning situations is the strategy that seems to work best to call the student's attention to his voice, word usage, personality, and courtesy on the telephone. The emphasis in role playing brings out that the student is not talking to a telephone but to another person, and his voice must represent him on the phone.

B. Teletrainer units or obsolete equipment furnished by phone companies are helpful; however, some teachers work successfully with substitutes such as play phones or tape recorders.

C. Work in small groups and record each student's voice as he responds to business telephoning situations, then use a checklist for analysis of the playback.

D. Some teachers develop their own telephoning situations based on local business firms. After a few sample situations, students enjoy suggesting problems that can be handled by a telephone call.

E. Speakers from telephone companies may be available to talk about voice, word usage, personality, and courtesy; usually free booklets are distributed, too.

F. Films and multimedia presentations are helpful in dramatizing the importance of voice, word usage, personality, and courtesy on the telephone. Use of a hand mirror to overcome "lazy lips" in enunciation and to work on projecting the "voice with a smile" can be tried.

G. Knowing how the employer wants his phone answered and being able to take a message after it is answered are very important to the new worker, and a good deal of actual practice should be given. Forms should be used for telephone messages.

Instructional Ideas	Notes
General: H. Problem-solving situations requiring the student to plan the phone call in advance may be used.	
I. Flowcharts showing various kinds of phone calls may be developed and used for discussion or bulletin board display.	
J. Field trips may be arranged to telephone company offices.	
K. Pushbutton telephones are in use in so many offices and stores that some "hands-on" experience with the equipment should be planned for each student.	
L. See Common Core Competencies--References, Manuals, Directories, Catalogs, and Simple Business Records.	

Number	Condition	Performance	Standard
115.01.01	Given a self-evaluation form, How Well Do You Know Yourself	the student will complete the evaluation, help compile a group tally of answers, and compare his evaluation to those of peers and the ideal score for a successful employee	so that a conclusion can be made as to whether an adjustment of his viewpoint is needed and, if so, a plan for improvement can be developed
115.01.02	Given a stress situation evaluation form, Under Stress, How Do You Get Along With Others	the student will complete the evaluation, score the paper, compare the results with an "analysis", and	seek suggestions from the instructor or counselor for a plan to improve
115.01.03	Given a list of habits and attitudes that antagonize	the student will date and mark areas needing improvement	so that a plan for improvement can be developed
115.01.04	Given the plan previously developed, adequate time for improvement, and a new evaluation form or rating sheet	the student will evaluate his growth	demonstrating growth

Number Instructional Ideas Notes

115.02.01
115.02.02
115.02.03
115.02.04

What shall we teach:

A. The student to:

1. Exhibit a positive self-concept and ability to understand himself.
2. Develop the ability to work cooperatively with others.
3. Practice consideration and respect for everyone.
4. Respect people's cultural differences.
5. Find peaceful means to settle disagreements.
6. Anticipate the results of aggressive behavior.
7. Become aware of the worth of each individual and to judge him on his own merits.
8. Understand that many tastes and preferences are culturally based, not inherited.
9. Recognize and appreciate that there are many approaches to a problem.
10. Learn that non-verbal communication can express as much as a verbal communication.
11. Understand that cultural open-mindedness will promote tolerance towards co-workers.
12. Recognize that each person has a contribution to make to the group - whether it be family, class, community, nation or world.
13. Subjugate his own desires for the benefit of the group.
14. Accept failure or criticism as a step forward toward positive growth.
15. Avoid using physical appearance as a criterion for judging the worth and capabilities of others.
16. Base judgment of and relationship with people upon each individual's merits and abilities - not upon his race, religion, or ethnic background.
17. Maintain a pleasant working environment.
18. Build sound working relationships in "forced" associations.
19. Develop personality traits necessary for successful job performance.
20. Exercise self-control during trying situations.

Number	Instructional Ideas	Notes

115.02.01 (continued)
115.02.02
115.02.03
115.02.04

21. Adjust to change.
22. Appreciate that honesty and integrity are personality traits necessary in job situations such as record-keeping, time-keeping, and stockkeeping in addition to jobs that require handling money.
23. Adapt to the personality and needs of customers.
24. Recognize the accomplishments of others.
25. Assist new employees in the department or store.

How shall we teach:

Note: The following suggestions are necessarily limited by the lack of extensive expertise in the area of instruction on the part of Task Force members. These ideas are provided as a starting point - with the hope that at a future time they can be expanded upon.

General: A. A variety of materials is available from sources such as:

- local business firms
- Department of Human Resources and Development
- private employment agencies
- Chamber of Commerce
- local service clubs
- California School Employee's Association
- temporary employment agencies
- state and federal agencies
  - Veteran's Administration
  - Rehabilitation Department
  - Civil Service Testing

General: (continued)

B. Ask the listed sources for items such as:
- interview evaluation forms
- employee evaluation forms
- employee inservice training materials
- employee handbooks
- employee attendance policy and charts
- list of possible guest speakers
    - personnel managers
    - owners of small business firms
    - secretary or clerk

C. In addition, contact the local telephone and/or utility companies for their Office/Customer Courtesy Handbook.

D. The following activities are related to some of the points itemized under the "What shall we teach" heading.

Respect people's cultural differences.
Give each of several students a copy of the following: "THE LENSES THROUGH WHICH ANY NATION LOOKS AT LIFE ARE NOT THE ONES THAT OTHER NATIONS USE" - Ruth Benedict.

1. Some boys are playing together. One boy says that they should have a race. Another boy, who is smaller than the rest, states that he does not want to run in the race. He starts to walk slowly away from the other, but he is stopped by the boy who suggested the race. WHAT WILL HAPPEN NEXT?

2. A handsome young man works in a place where he sees a beautiful young lady almost every day. He is strong, healthy, and intelligent. He does not have a wife. He would like to marry and have a family. The young lady is graceful, well-mannered, and charming. She too is unmarried. WHAT WILL HAPPEN NEXT?

Number | Instructional Ideas | Notes

General: D. (continued)

Ask students to read the first situation. Allow for an open-ended discussion of the "What will happen next?" question. When all points of view have been presented, tell the students that the boys involved are members of a Navajo culture which frowns upon competition. Ask the students how this will affect what will happen next.

Then ask the students to read the second situation. Allow discussion time; then tell students that the man and woman mentioned were members of two different castes in 19th century India. Again ask "What will happen next?" and discuss the implications of castes in social relationships.

Understand that cultural open-mindedness will promote tolerance towards co-workers.
Assign the following paragraph as an exercise in tracking down origins of words; doing so will help to show the dependence of English on other languages.

> "Wednesday, the thug loafed at a damask-covered table on the balcony of the cafe. He scanned a cosmopolitan menu which included items like: apple pie, goulash, sugar cookies, Roquefort cheese, pizza, stroganoff, enchilades, and bubbling cider. All this and much more was spread out as a tempting smorgasbord. He ordered only a chocolate-flavored liqueur. At the next table was a beautiful half-caste brunette in a lemon colored frock with kimona sleeves. Around her shoulders was a crimson angora shawl. He ignored her while he deciphered a code on the back of the paper menu; it arranged his rendezvous with a canny smuggler of tea cargoes."

HOW MANY OF THE ABOVE WORDS DID YOU FIND THAT ARE NOT PURE ENGLISH WORDS?

Number Instructional Ideas Notes

General: D. (continued)

Respect people's differences.
Human beings share more similarities than differences; yet existing differences enrich our lives. Each person has some contribution to bring to the group.

In order to recognize contributions that each one of us in the office or in the classroom has to make, we must know each other better. Have students pair up and interact with each other. After they have talked with each other and discovered some attributes, have them tell the larger group about the other person. These attributes may be hobbies, religious beliefs, clothing tastes, etc.

Avoid using physical appearance as a criterion for judging the worth and capabilities of others.
Divide students into two groups - those with brown eyes and those with blue eyes (or straight/curly hair; long/short hair). Discuss whether any judgments can be made about the group as a whole.

Base judgment of and relationships with people upon each individual's merits and abilities - not upon his race, religion, or ethnic background.
Hand out a sheet of paper to each student and ask him to complete the following sentences:

1. Prejudice is ________________
2. Blacks are ________________
3. All Jewish people ________________
4. People who are black ________________
5. The smartest people in the world ________________
6. One group of people who have never accomplished anything ________________
7. You can identify a Russian by ________________
8. People with German blood and people with English blood ________________

Number Instructional Ideas Notes

General: D. (continued)

Compile the completed statements for each sentence and hand back to all students. This can be used for discussion purposes to demonstrate that it is very difficult to make judgments about an individual using a group label.

Ask one of the female students to imagine that one of her girlfriends has arranged a blind date for her for next Saturday night. All she knows about her date is that he is Irish. Then ask her questions such as:

1. What do you think he will be like? (personality, characteristics)
2. What problems do you think might arise in the course of the evening?
3. Where do you think he will take you?

Repeat the situation with the boys, except tell them their date is a blond and ask them questions such as:

1. What do you think she will be like? (dumb, sexy)
2. Do you think you will have a good time? Why?
3. Where do you want to go? Why?

Change the group identification of the date, i.e. French girl, upper economic group, etc., and ask several boys to respond to the questions. Keep a list of the stereotypes expressed by the students. Once stereotypes are identified, they can be dealt with logically.

Point out that stereotypes are labels one assigns to persons or groups and that stereotypes can take the form of identifying physical characteristics with character traits and identifying specific traits as inherent in an entire group.

Example:
Irish - drunkard, violent, witty
Italian - impulsive, passionate, religious
Jew - clannish, greedy
Blond - dumb, sexy, have more fun

Number | Instructional Ideas | Notes

General: D. (continued)

Fat people - jolly
Bald people - intelligent, egghead
Lawyer - shyster
Professor - absent-minded

To make students aware of how others stereotype them:

1. Ask the students if they are stereotyped by others.

   Do some people attribute moral and character traits to them on the basis of physical characteristics or groups to which they belong?

   Do some people prejudge (prejudice) them?

   Have they ever been prejudiced or stereotyped on the basis of:
   a. Age? "Teenagers are rowdy, disrespectful, irresponsible and delinquent."
   b. Appearance? "People with long hair are weird."
   c. School attendance? "Students from Central School are snobs (or delinquents)."
   d. Area in which they live? "People from that area are undesirable (or snobs)."
   e. Nationality? "Americans are materialistic."

2. To demonstrate the stereotypes of the teenager, ask the students questions, such as the following:
   a. How are you treated in restaurants?
   b. Are you ever refused service because you are a teenager?
   c. Are you treated rudely because you are a teenager?
   d. Were you ever told to eat quickly and leave?
   e. Are you watched closely or followed by the floorwalker when you enter a department store?
   f. Were you ever suspected or accused of stealing?

Number | Instructional Ideas | Notes

General: D. (continued)

To make the students aware of the fallacies of stereotypes:

1. Have the students respond orally to the following questions?
    a. In what ways are the members of the class similar?
    b. Why does the class share common traits?

2. Present the concept that stereotypes have a core of truth and the effects of a shared environment upon a group are used as "proof" of the validity of the stereotype.

3. Ask if any two students in the class are exactly alike. The students should see many differences. Make a list of the differences and discuss them.

4. What accounts for the difference within the class? Discuss the effects of different environments within the class. Point out that no two persons share exactly the same environment and, therefore, one often finds great differences even among persons who share a very similar environment, such as a family.

5. Other questions for discussion:
    a. Are any two members of your family exactly alike?
    b. Are identical twins exactly alike?
    c. Are any two of your teachers exactly alike?
    d. Are any two members of your religion, ethnic group, racial group exactly alike?

HOW WELL DO YOU KNOW YOURSELF?

Instructions: Rate yourself to the best of your ability in the appropriate column. If your answer is not a definite yes or no, use the (?) column. Score yourself as follows: "Yes" 2 points; Question (?) 1 point; "No" 0 points.

Your Work Habits

	Yes	?	No
1. Do you listen to directions carefully so that you don't have to ask too many questions?			
2. Do you plan ahead so that you can keep more than one job moving?			
3. Do you do a job in the best or the most suitable way, such as studying your problem and then arranging the procedure logically?			
4. Do you do your best whether you enjoy what you are doing or not?			
5. Do you usually do things right the first time?			
6. Do you stick to a job until it is done?			
7. Do you get your assignments done well, in spite of interruptions?			
8. Do you study your lessons consistently?			
9. Do you keep your materials and equipment neat and in order?			
10. Do you have necessary supplies for class each day?			
11. Are you proud of the work you do?			
12. Do you work accurately and rapidly?			
13. Do you proofread your work well?			
14. When confronted with a question, do you try to find an answer yourself?			

Your Honesty and Dependability

	Yes	?	No
15. Are you honest when you have a test?			
16. When you are asked for your honest opinion, are you sincere?			
17. Do you meet obligations promptly?			
18. Are you the type of person who can be relied upon?			
19. Can you finish a job without being reminded several times?			
20. Do you submit your assignments at the time they are due?			
21. Do you actually work on your studies when you are given time to study them?			
22. Do you get to classes on time?			
23. Are you punctual?			
24. Do you admit your mistakes rather than make excuses for them?			
25. Can you handle a little extra work?			

HOW WELL DO YOU KNOW YOURSELF? (continued)

Your Personality

	Yes	?	No
26. Do you develop an interest in related areas of activity?			
27. Are you sincere in your speech and actions?			
28. Do you have confidence in yourself to handle a job or a situation well?			
29. Do you greet people with a smile?			
30. Do you have a good sense of humor?			
31. Is the tone of your voice pleasant?			
32. Do you speak clearly and distinctly?			
33. Do you practice good manners?			
34. Do you easily adapt yourself to new situations?			

Your Poise

	Yes	?	No
35. Do you think of what you are going to say before you say it?			
36. Do you dress appropriately for school?			
37. Are you well groomed?			
38. Do you feel at ease when talking with others?			
39. Do you avoid emotional outburst and displays of temper?			
40. Can you discuss something without arguing?			

Your Tolerance

	Yes	?	No
41. Are you careful not to say things that might offend others?			
42. Do you consider the feelings of others in your everyday activities; such as riding the bus, walking down the halls, or sitting in class?			
43. Are you open minded and willing to listen to all sides of a question?			
44. Do you respect the ideals and feelings of others?			
45. Are you courteous and tactful when you come into contact with someone you don't particularly care for?			

Your Health

	Yes	?	No
46. Are you in good physical and emotional health?			
47. Do you spend adequate time on your personal cleanliness			

HOW WELL DO YOU KNOW YOURSELF? (continued)

Your Desire to Improve

	Yes	?	No
48. Can you accept constructive criticism without resentment?	____	____	____
49. Are you able to give constructive criticism without offending anyone?	____	____	____
50. Do you show genuine appreciation when someone helps you?	____	____	____
51. Are you grateful for the opportunity of learning?	____	____	____
52. Do you have a definite goal that you are striving toward?	____	____	____
53. Do you really try to make the most of your talents, training and experience?	____	____	____

Your Relationship with Others

54. Are you enthusiastic about the clubs and activities to which you belong?	____	____	____
55. Are you pleasant and cooperative?	____	____	____
56. Do you try to help someone else if and when you can?	____	____	____
57. Do you treat your classmates with courtesy and respect?	____	____	____
58. Are you courteous and respectful to your teachers?	____	____	____
59. Do you try to get along with all types of people?	____	____	____
60. Are you a person who cultivates friendships?	____	____	____
61. Are you loyal to your friends?	____	____	____
62. Are you loyal to your school?	____	____	____
63. Do you keep confidences?	____	____	____
64. Are you courteous and respectful to your parents?	____	____	____

HOW DO YOU RATE? If your score is 120--128, What is your secret? 108--109, You're doing well! 96--107, Are you willing to be just average? Below 96, You had better start improving now!

UNDER STRESS, HOW DO YOU GET ALONG WITH OTHERS?

A successful person should know how to get along with others. By the honest results of this self-test, you will see how you are doing. Check your answers.

1. You meet a person you immediately do not like. You would:
    ____ a. Try to find a topic of conversation of common interest.
    ____ b. Avoid the person.
    ____ c. Try to put him or her in his place.

2. You are offered a job for which you are not fitted. You would:
    ____ c. Try to bluff through it.
    ____ b. Refuse to try.
    ____ a. Admit your inadequacy and offer to learn on the job.

3. When dealing with people, such as sales clerks, waitresses, etc., you:
    ____ a. Usually smile and say something pleasant.
    ____ b. Are nice if they are pleasant to you.
    ____ c. Treat them impersonally.

4. You have been overcharged in a store. You would:
    ____ b. Pay the bill without saying anything.
    ____ c. Tell the clerk he has cheated you.
    ____ a. Ask the clerk to recheck the bill.

5. When you meet a person who is badly crippled, you:
    ____ c. Try to avoid him or her.
    ____ b. Go out of your way to be especially nice.
    ____ a. Treat the person as you would anyone else.

6. A friend has just bought a suit which you think is unbecoming. He or she asks if you like it. You would say:
    ____ c. "It looks terrible."
    ____ a. "I think you'll be happy with it."
    ____ b. "How's the weather today?"

7. You honestly feel that you:
    ____ a. Are interested in most people.
    ____ c. Are bored by most people.
    ____ b. Are only really comfortable with your own clique.

UNDER STRESS, HOW DO YOU GET ALONG WITH OTHERS? (continued)

8. In a store you are in no hurry, but the person after you is rushed. You:
    ____ b. Make your selection because it is your turn.
    ____ a. Suggest to the person to go ahead of you.
    ____ c. Take an extra long time just to calm him or her down.

9. When you meet people of different races or religions, you:
    ____ b. Have a secret feeling of fear.
    ____ a. Consider them as human beings much like yourself.
    ____ c. Are convinced your way of life is superior.

10. After a picnic you find there is no trash basket. You would:
    ____ a. Take the papers, bottles, and food home with you.
    ____ c. Leave it on the ground.
    ____ b. Try to hide the trash on the property.

SCORING

Give yourself 5 points for every "a" answer and 3 points for every "b" answer. No points for "c" answers. Add up your score.

ANALYSIS

35 to 50 points: You are very good in your relationship with others all of the time because you respect others and greet them with interest and courtesy. You are liked by your friends and those with whom you deal in a casual way.

18 to 34 points: You do very well with others most of the time, but you are sometimes self-centered and forget to put yourself in the other person's shoes. Try working toward more of those "a" answers, and you will find that living is more pleasant than it is now.

0 to 17 points: You are having trouble - either because you are too shy or too aggressive. You know which! Good human relationships are like anything else in life; they take practice. Select someone you know who is truly gracious; analyze his or her actions, then adapt those traits to your own personality.

HABITS THAT HANDICAP AND ATTITUDES THAT ANTAGONIZE

	Date	Could Improve	Date	Have Improved
1. I talk too loudly.				
2. I use profanity when I am angry.				
3. I put my feet up on tables and seats.				
4. I rush through doors, into elevators, etc., without consideration of the rights and feelings of others.				
5. I am convinced my opinions are usually the only correct ones.				
6. I am habitually too grouchy.				
7. I am too quick tempered.				
8. I am too serious most of the time.				
9. I use foul language habitually, "gutter talk."				
10. I yawn audibly and visibly at lectures, in class, or in church.				
11. I am a habitual and confirmed gossiper.				
12. I have a habit of tardiness.				
13. I am careless and frequently fail to speak to friends and acquaintances.				
14. I am frequently sarcastic.				
15. I am sometimes dishonest or tricky in little ways.				
16. I am a habitual borrower.				
17. I am careless of other people's property.				
18. I am stingy - a tightwad.				
19. I talk too much.				
20. I am a human clam - don't talk enough.				
21. I think practical jokes are great fun.				
22. I habitually put things off.				
23. I have little sense of humor.				
24. I have little ambition to succeed in life.				
25. I interrupt other people's conversations.				
26. I have annoying mannerisms				

LIST OF 14 REASONS WHY PEOPLE FAIL

1. Unwillingness to cooperate with, or help others.
2. UNREALIABILITY, lack of dependability.
3. Discourteousness, rudeness, indifference to the other fellow's feelings.
4. Carelessness, indifference, the "So What" attitude: "I'll get by."
5. **SARCASM**: "Cutting the other fellow down to size." Too free with the stinging rebuke and the humiliating remark, making fun of others.
6. Desire to domineer, wanting to boss others, ACTING SUPERIOR.
7. **TROUBLEMAKING**, agitating, always dissatisfied, "the world owes me a living attitude."
8. Laziness, Loafing on the job, Habitual lateness.
9. Disagreeableness, Lack of respect for others, the I'm right but the world is all wrong attitude.
10. **MISCONDUCT**. Violation of rules. **UNWILLINGNESS TO CONFORM TO** prescribed standard recognized as essential for the well-being of all.
11. Drinking to excess.
12. Partying to excess during the week whereby it affects your work.
13. **DISHONESTY**.
14. **ABSENTEEISM** - found wanting in the sense of responsibility.

YOU CAN GET SOME IDEA RIGHT NOW AS TO WHETHER OR NOT YOU WILL HOLD YOUR JOB AND GET AHEAD. A GREAT MAJORITY OF PEOPLE WHO FAIL TO WIN PROMOTIONAL SUCCESS OR WHO LOSE THEIR JOBS OR FAIL IN BUSINESS DO SO BECAUSE:

THEY CANNOT GET ALONG WITH OTHER PEOPLE. THEY RUB PEOPLE THE WRONG WAY.

YES NO Just how well do you get along with other people? What would your score be on answers to these questions?

___ ___ 1. Are you loyal--to your family, your friends, your school? (If so, you will likely be loyal to your employer--and loyalty is a must. If you find yourself complaining about your job, the hours, the pay, etc., then you should quit. If you don't, you will find that the job will soon quit you.)

___ ___ 2. Do you admit your mistakes? Do you "pass the buck"? (Admitting a mistake will make the boss think more of you than if you try to cover up.) The only people who don't make mistakes are people who don't do anything.

___ ___ 3. Are you careless about being on time? (Punctuality is expected. It may not win you any promotions, but a lack of it will certainly win you unemployment.)

___ ___ 4. Do you give the impression that you think the world owes you a living? (It doesn't, you know.)

___ ___ 5. Do you grumble about the work you have to do? (Remember--You asked for work.)

___ ___ 6. Can you accept criticism? (It is through mistakes that we learn--IF we correct the mistakes.)

___ ___ 7. Do you pass your problems on for somebody else to solve? (You'd better watch out for this on the job--the ones who solve your problems may be the ones who get ahead instead of you.)

___ ___ 8. Are you loud and boisterous? (A calm, quiet manner is much more effective with everyone. "Easy does it.")

___ ___ 9. Do you show appreciation when someone does something for you? (Showing appreciation doesn't cost you a thing, and will open many doors to you.)

___ ___ 10. Do you waste time on long-winded conversations? (Small talk and little people are very close traveling companions.)

THEY CANNOT GET ALONG WITH OTHER PEOPLE. THEY RUB PEOPLE THE WRONG WAY. (continued)

YES NO

___ ___ 11. Do you keep your promises? (Making good on all your promises means you're dependable, and dependable people get ahead.)

___ ___ 12. Are you a bluffer? Do you try to bluff your way through when you don't know the answers? (Bluffing seldom fools anybody, and it's a very good way to lose people's confidence.)

___ ___ 13. Do you have a nasty temper? Are you moody? (Losing your temper is a quick way to lose the respect of others.)

___ ___ 14. Do you keep putting off things that should be done? (Waiting won't make a job easier. Remember--A job begun is a job half done.)

___ ___ 15. Do you belittle others? (We belittle only ourselves when we make others appear to be small.)

___ ___ 16. Are you a gossip? (Many promising careers have been ruined by idle gossip.)

___ ___ 17. Do you "soft soap" people merely because you think they can do something for you?

___ ___ 18. Are you untidy? (To many employers, an untidy desk or untidy appearance indicates a disorderly mind.)

___ ___ 19. Do you try to impress others by "hogging the limelight"? (Enthusiasm is fine, but don't push others aside.)

___ ___ 20. Do you borrow money--or are you always "fresh out" of this or that, such as paper, pencil, etc.? (Shakespeare said, "Neither a borrower nor a lender be, for loan oft loses both itself and friend.")

___ ___ 21. Do you try to be the teacher's pet? (Privileges must be earned.)

___ ___ 22. Do you try to stir up dissatisfaction among others? (In the end, trouble usually bounces back on the troublemaker.)

___ ___ 23. Are you a snooper? (People who look over other people's shoulders or listen in on their conversations or ask personal questions have found a sure way to lose friends.)

___ ___ 24. Do you do just enough to get by, or do you try to do at least a little more than is expected of you? (In the business world, it's the person who works "beyond the call of duty" who gets ahead. Employees who are allergic to extra work and who watch the clock are generally overlooked when better jobs come up.)

Number	Condition	Performance	Standard
116.01.01	Given 20 sentences, some of which are incomplete	the student will identify the incomplete sentences	with 80% accuracy
116.01.02	Given 5 incomplete sentences	the student will rewrite them into complete sentences	with 80% accuracy
116.01.03	Given a dictionary and 5 sentences containing errors in word usage	the student will correct the sentences	with 80% accuracy
116.01.04	Given simple/compound sentences with punctuation omitted	the student will punctuate the sentences	with 80% of the sentences punctuated accurately
116.01.05	Given 5 simple sentences with capitalization not indicated	the student will capitalize where necessary	with 80% accuracy
116.01.06	Given a job-related situation requiring a note or message	the student will write a brief statement	which conveys the essence of the message and contains no serious defects in word usage or punctuation

Number	Instructional Ideas	Notes
116.02.03	The sentences may contain the following problems: a. agreement of subject and verb b. present, past, and future tenses c. troublesome verbs such as sit/set, shall/should, can/could, rise/raise An example of a sentence requiring selection of proper word: (can, may) I borrow your pencil?	
116.02.04	An example of a sentence with punctuation omitted: Mr. Smith our coach always laughs	
116.02.05	An example of a sentence without capitalization: the dodgers' stadium is located in chavez ravine in los angeles, california.	

200. OFFICE CORE

Competency Modules

201. Duplicating
202. Filing and Retrieving
203. Mail
204. Petty Cash
205. Spelling
206. Typing
207. Working with People
208. Written Communication

For this Guide, three office jobs were selected: General Office Clerk; Clerk-Typist; and Stenographer. These were chosen because they provide extensive opportunity for entry-level employment at the high school level. Those competencies common to all three selected jobs were placed in the Office Core. Competencies in succeeding sections were directly related to the specific job title.

Based upon studies identified in the introduction to this Guide (Davis and Smith, Erickson, Kallaus, Perkins, et al.) skills and standards associated with the performance of major types of office work were identified. Competence in a cluster of tasks within these skills would be applicable to many clerical jobs.

To qualify for one of the selected jobs, a student should have completed the Common Core competencies, the Office Core competencies, and competencies for a specified job. Because of the interrelationship among the selected jobs and with other jobs within the clerical field, students may develop requisite competence for more than one job concurrently.

The Dictionary of Occupational Titles did not indicate a three-step hierarchy for the selected office jobs. By referring to the job descriptions (pg. 18), it can be noted that the Stenographer must be competent in all of the General Office Clerk skills and the majority of Clerk-Typist skills. The Clerk-Typist needs only some of the General Office Clerk competencies. General Office Clerk competencies may be intensified for special clerks; e.g., Receptionist, Mail Clerk, File Clerk, Accounts Receivable/Payable Clerk, et al.

Performance objectives for the Office Core competencies - those common to the three selected clerical jobs - have been designed so that a student's ability to use his knowledge effectively in execution of an entry-level clerical job task can be measured by the standards that are compatible with minimum office requirements. Additional performance objectives for these and other competencies appear in succeeding specialized job categories with appropriate standards. Instructional ideas related to the performance objectives are not inclusive, but they have been used successfully in a classroom.

Number	Condition	Performance	Standard
201.01.01	Given: - a fluid duplicator - a properly prepared master - instructions for number of copies, color and size of paper, and placement on page	the student will operate the duplicator and produce copies	meeting the following criteria: - free of smudges - free of wrinkles or marks caused by wrinkled master - legible - on duplicator of the color and and size specified - properly placed on page - correct number of copies
201.01.02	Given: - an offset printer - properly prepared master - instructions for number of copies, kind, color, and size of paper	the student will operate the printer and produce copies	meeting the following criteria: - free of smudges - legible - on the paper specified - correct number of copies
201.01.03	Given: - a photocopier - material suitable for photocopying - instructions for number of copies, size of paper, and placement on page	the student will operate the copier and produce copies	meeting the following criteria: - proper contrast for good legibility - on the size of paper specified - properly placed on page - correct number of copies
201.01.04	Given: - a mimeograph machine - properly prepared stencil - instructions for number of copies, color and size of paper, and placement on page	the student will operate the mimeograph machine and produce copies	meeting the following criteria: - free of smudges - free of wrinkles or marks caused by wrinkled stencil - legible - on mimeograph paper of the color and size specified - properly placed on page - correct number of copies

Number	Condition	Performance	Standard

201.01.05	Given:
	- a thermal copier
	- material suitable for the thermal process
	- instructions to prepare:
	  - single copy
	  - fluid duplicator master
	  - thermal stencil
	  - overhead transparency
		the student will operate the copier and produce each item	meeting the following criteria:
			- good contrast between content and background
			- free of wrinkles or marks caused by wrinkled original
			- all content legible
			- placement appropriate for intended use of finished product

201.01.06	Given: - a standard paper cutter - paper to be cut - instructions for size of finished product	the student will operate the paper cutter and produce output	meeting the following criteria: - measurement as specified - neat, uniform edges - neatly stacked for delivery
201.01.07	Given: - an adjustable three-hole punch - paper to be punched - instructions for number and location of holes	the student will punch the paper	meeting the following criteria: - holes in locations specified - uniform spacing between holes and edge of paper
201.01.08	Given: - a stapler - papers to be collated and stapled - instructions covering sequence of pages and location of staples	the student will collate and staple	in accordance with the following criteria: - all pages will be in the specified sequence with no repetition or omissions - edges of finished product will be uniform - staples will attach all pages securely - corner stapled documents will be stapled on an angle in the upper left-hand corner - top-bound and left-bound documents will be stapled at a uniform distance from the edge of the paper

Number	Condition	Performance	Standard
201.01.09	Given: - an empty stapler - staples	the student will load the stapler	so that it will operate consecutively

Number | Instructional Ideas | Notes

201.02.01 What to teach:

a. principles of fluid process
b. kinds of equipment (variety of manufacturers, manual and electric models)
c. typical parts
d. checking and adding fluid
e. adjustment of paper guides and rollers
f. principle of setting and adjusting pressure control
g. attaching master
h. operation of handle (direction) and/or procedure for starting and stopping electric models
i. checking first copy
j. procedures for adjusting placement
k. procedures for removing or covering excess carbon if necessary to produce good quality copies
l. counter operation
m. removal of master
n. storage and/or disposal procedures
o. clean-up of hands and work area

How to teach:

a. teacher explanation and demonstration
b. learning activity package
c. multimedia approach with slides or filmstrip and printed script or tape

Any or all of these methods will provide initial instruction. Competency comes with correct practice. Take advantage of every opportunity to have students operate the fluid duplicator to produce copies of materials needed in the department instructional program, for the school, or for nonprofit community agencies which supply their own materials.

Number **Instructional Ideas** **Notes**

201.02.02 What to teach:

a. principles of the offset duplicating process
b. control levers
c. paper guides and feed rolls
d. pressure adjustment
e. placement adjustments
f. attachment of master
g. etching
h. running of copies
i. storage of master
j. clean-up procedures

How to teach:

a. introductory reading assignments with written test of study guide (or programmed instruction)
b. filmstrips
c. plenty of practice, closely supervised at first by teacher, aide, or experienced student

Ivarie describes a complete multimedia offset learning system in "Learning System for Offset Duplication," BUSINESS EDUCATION FORUM 23:22-4, May 1969.

201.02.03 What to teach:

a. principles of copying process involved
b. laws related to copying
c. kinds of documents that do not reproduce well (dark backgrounds, goldenrod paper, faint fluid duplicator copies)
d. loading of paper (including variety of sizes)
e. positioning of source document
f. setting counter
g. checking and adding toner
h. removing paper caused by misfeeds and paper jams
i. procedure for reporting need for repair

Number Instructional Ideas Notes

201.02.03 (continued)

How to teach:
a. post basic operation procedures in conspicuous place on or near copier
b. construct learning activity package including pictorial programmed instruction based on manufacturer's manual
c. provide opportunities for practice, closely supervised at first by teacher, aide, or experienced student

Extensive opportunities can be provided by establishing a live office, clerical services center, or publication office within the business department to provide service to the campus. Having this equipment in the business department for student operation rather than in an administrative or instructional materials center for operation by clerical workers and teacher aides provides a variety of work experiences for students. Doing real work instead of created projects increases student motivation and sense of responsibility. It also affects their attitude toward work produced and gives them experiences in work scheduling, establishment of priorities, and dealing with people requesting the services they perform.

201.02.04 What to teach:
a. principles of the stencil duplicating process
b. advantages and disadvantages
c. machine parts
d. checking and adding ink
e. paper tray adjustments
f. attachment of stencil
g. checking first copy
h. placement adjustments
i. setting counter
j. running copies
k. storage and/or disposal of stencil including running file folder through machine so that contents are printed on folder

Number **Instructional Ideas** **Notes**

201.02.04 (continued)

l. using multicolor pads
m. changing ink pad
n. changing drum (if appropriate for machine available)
o. cover-up and clean-up
p. thermal and electronic stencils (Awareness of their existence as a minimum; pictures and/or samples better; if possible, mimeograph machine operators should also develop competency in preparing stencils by means of a thermal copier and electronic stencil maker.)

How to teach:
a. teacher explanation and demonstration
b. learning activity packages
c. multimedia approach with slides or filmstrip and printed script or tape

201.02.05 What to teach:*
a. principle of thermal process
b. kinds of material that will copy satisfactorily with the process (colors other than black generally do not reproduce; printing as small as newsprint may be difficult to read when reproduced)
c. setting controls for speed (regulates length of time exposed to heat)
d. use of carrier
e. kind of paper to use for single copies
f. kind of masterset to use for fluid duplicator
g. kind of stencil required for thermal stencil
h. placement of source document in relation to copy medium (paper, master, stencil, or transparency)

*Although not a part of the performance objective, if the thermal copier available is capable of laminating copies, this process should be taught also.

Number Instructional Ideas Notes

201.02.05 (continued)

How to teach:
Demonstration by teacher, aide, or experienced student is probably the best and easiest way to teach this relatively easy-to-learn skill. Emphasis should be placed on the development of judgment as to kinds of materials that will copy satisfactorily and especially the development of the ability to evaluate the quality of copies produced. Copies should be checked carefully so that neat adjustments can be made as needed to produce copies meeting the standards specified.

201.02.06 What to teach:

a. attitude--Develop a sense of responsibility for completing all tasks so that the student can be proud of the output. Attention to detail can make the difference between a high-quality finished product and a sloppy one. A carefully prepared master and a good duplicating operation can lose effectiveness if the paper is not cut neatly.
b. quantity of paper that can be cut effectively in one operation with the equipment used.
c. use of scale--Don't just assume that every student knows how to read the ruler and use it properly.

How to teach:
Be where the action is! One of the most effective means of teaching duplicating and the related skills of operating the paper cutter, punch, and stapler is through a program of clerical and production services to the department, school, and/or community.

This can provide a "real world" kind of setting where students learn to take responsibility for scheduling jobs, assigning priorities, keeping track of progress, etc. The teacher then is free--TO TEACH. Don't wait until a project is finished and then tell the student what is wrong with it. Be available at all times! When a student hesitates or begins to perform a task in a way that will not produce attractive results, the proper procedures can be explained immediately in a way that will not be demeaning. Don't give the impression that a task is so simple that everyone should intuitively do it properly.

Number Instructional Ideas Notes

201.02.07 What to teach:
a. quantity of paper that can be punched effectively at one time
b. purpose and use of paper guide
c. use of scale to adjust location of holes

How to teach:
Because the paper punch appears to be such a simple piece of equipment, it is easy to assume that there is nothing to learn about its operation. However, without some instruction, students are not aware of the use of the paper guide and the need to check and/or set the punching locations before they proceed. Consequently, time and duplicated pages may be wasted while a student stumbles through the trial and error method of learning.

A one-page diagram can be prepared and posted near the equipment with arrows pointing to the paper guide and to the frequently used positions on the scale.

Practice should be provided whenever there is a project requiring punching. There should be sufficient opportunities in the production of department instructional materials to provide a number of students with the experience of operating a paper punch to produce output to meet the criteria listed. Even simple tasks should be evaluated in accordance with standards of quality and neatness. There is no excuse for students to be satisfied with sloppy results unless the teacher conveys a "don't care" attitude.

Number	Instructional Ideas	Notes
201.02.08- 201.02.09	Teaching a student to collate and staple is no "big deal," and there is no reason for a teacher to try to make it so. It is included as a performance objective because it is a task so frequently performed by office workers. And, unless the teacher pays some attention to the student performance of the task, the finished products are assembled in a manner that is inefficient in terms of time spent on the task and unattractive and/or unsuitable for the purpose intended. Teaching in this area should be done by demonstrations, explanations, and/or reminders whenever any project requires collating and stapling. Whenever the opportunity arises, students should also have the experience of reloading staplers rather than having such tasks performed for them. If the equipment is available, students should have practice in setting up and collating with a rack and operating an electric collator and electric stapler. If an electric collator is used, it is recommended that step-by-step instructions be prepared and posted conspicuously by the machine. It may also be desirable to produce a pictorial pamphlet and/or slides or filmstrip for the particular piece of equipment students will use in the program.	

Number	Condition	Performance	Standard
202.01.01	Given 50 cards or documents	the student will arrange items according to alphabetic and numeric filing rules	with 90% accuracy
202.01.02	Given 20 documents	the student will place all documents alphabetically in the files and in chronological order within each folder	with 90% accuracy
202.01.03	Given 3 requests for retrieval of documents and/or file folders	the student will retrieve the items requested and record the check out information	with 90% accuracy
202.01.04	Given 20 numbered documents	the student will file all documents numerically in the files and in chronological order within each folder	with 90% accuracy

Number	Instructional Ideas	Notes
202.02.01	Students should be able to perform this objective within 15 minutes. Give unarranged cards or documents. This objective may be reached by many students on the pre-test. Thus, they can move right on to the other objectives. This is a good time to teach the use of the various sorters and sorting racks.	
202.02.02 202.02.04	Emphasis should be placed on learning the basic alphabetic and numeric filing rules. Students should do many drills on the rules. Demonstrate the correct way to place documents in the file folders. Filmstrips on filing rules may prove helpful.	
202.02.03	Stress the importance of recording the check out information correctly. There should be no time limit set to reach the objective. The student should know the different procedures to be used in checking out selected papers or entire folders. A good way to teach retrieval of files or documents is to have students locate materials in the classroom files or set up a filing practice set for retrieval.	

Number	Condition	Performance	Standard
203.01.01	Given 10 pieces of incoming mail	the student will process as follows: a. open all but "personal" or "confidential" b. remove contents c. attach envelope to correspondence d. attach enclosure e. make note on letter if enclosure is missing f. time stamp g. sort	with 9 of the 10 pieces processed correctly
203.01.02	Given 10 pieces of outgoing mail	the student will process as follows: a. separate file copy from original b. check for proper enclosures c. verify correctness of address on document and corresponding envelope d. fold to fit envelope and insert e. seal envelope f. sort	with 9 of the 10 pieces processed correctly
203.01.03	Given 5 pieces of incoming interoffice mail	the student will process as follows: a. open b. time stamp c. sort d. save envelope	with 4 of the 5 pieces processed correctly

203.01.04	Given 5 pieces of outgoing mail	the student will process as follows: a. separate file copy from original b. check for proper enclosures c. write addressee's name and/or department on envelope d. fold to fit envelope and insert e. fasten envelope	with 4 of the 5 pieces processed correctly

Number	Instructional Ideas	Notes
203.02.01	Discuss with a group or individually by cassette the importance of knowing the exact time a letter is received; also, how to handle a situation in which a "confidential" letter is accidentally opened. Mail and accompanying envelopes may be obtained from a typing class and should include personal and confidential letters, letters with and without enclosures, and letters with missing enclosures.	
203.02.02	Discuss with a group or individually by cassette the importance of properly preparing letters and other materials for mailing. Demonstrate the correct methods of folding and inserting letters into various sizes of envelopes on the bulletin board or by slide/tape.	
203.02.03	Discuss with a group or individually by cassette the various procedures used for handling interoffice messages. Students may prepare memos and distribute to members in the class.	

OFFICE CORE PETTY CASH COMPETENCY 204

Number	Condition	Performance	Standard
204.01.01	Given a check for the amount of a petty cash fund, forms, and a narrative of transactions	the student will complete appropriate forms and records to establish, maintain, and replenish the fund	accurately

Number	Instructional Ideas	Notes
204.01.01	A. Refer to company policy manuals which state procedures for handling cash, cash proof forms, and the safeguarding of money and records. B. Collect petty cash forms from local businesses and from vendors. C. Personnel handling petty cash funds in the school district or local businesses can explain petty cash procedures. D. See Common Core Competency 107, Making Change.	

Number	Condition	Performance	Standard
205.01.01	Given orally 75 common business words encompassing the following: - pronounciation - "ie" or "ei" usage - changing "y" to "i" - dropping final "e" before suffix - doubling consonant before suffix - spelling demons - prefixes and suffixes - endings - homonyms - apostrophes	the student will write, type, or orally spell the words	with 80% accuracy, but not more than 2 errors within each category
205.01.02	Given 20 sets of 3 words	the student will identify a misspelled word in each set	with 80% accuracy

Number	Instructional Ideas	Notes
205.02.01	One method of gathering "difficult-to-spell" words is to collect student misspellings. For details refer to Ammon, "A Practical Way to Teach Spelling," Education Digest, March, 1970, pp. 53-54.	
205.02.02	Create sets of three or four words each with not more than one word spelled incorrectly within each set. Have the student circle the incorrectly spelled word and write it correctly.	

Number	Condition	Performance	Standard
206.01.01	Given paragraphs of average difficulty (approximately 1.5 syllabic intensity)	the student will touch type for a period of 5 minutes	at a rate which exceeds his normal handwriting speed with not more than two errors per minute. Note: Although many General Office Clerks are required to type at 40 wpm, a typing rate in excess of handwriting speed is adequate for many positions in the general office area.
206.01.02	Given a correct copy of paragraphs containing words and numbers and copy containing 20 common typographical errors	the student will locate and mark with standard proofreading symbols the errors on the incorrect copy	with no more than - 2 undiscovered errors - 2 incorrect proofreading symbols
206.01.03	Given - an eraser - correction tape - correction fluid	the student will demonstrate that he can use each kind of correction aid on separate pieces of copy that he has typed	with undiscernible correction of all errors as follows: - correct character hiding any sign of the incorrect one - area around the corrections not smeared - correct character exactly on the line of writing and properly filling the space available - finished copy neat and clean - paper not worn through at point of correction by eraser

Number	Condition	Performance	Standard
206.01.04	Given copy which is edited or handwritten	the student will type a rough draft	that meets the following criteria: - copy is double-spaced - content of the draft is identical to the source - copy contains no unmarked typographical errors or spelling errors - typing errors are corrected by cross outs and/or legible handwriting
206.01.05	Given a list of 25 words	the student will indicate an acceptable point to divide each word	with no more than 5 errors as measured by generally accepted word-division rules
206.01.06	Given a request for corrected carbon copies to accompany an original document and - individual carbon sheets - a snap-apart carbon set - carbonless (sensitized) paper	the student will prepare the original and the required number of carbon copies	with undiscernible correction of all errors meeting the following criteria: - correctly placed on the page - do not contain uncorrected typographical errors - have content identical to original - are free of smudges, strike-overs, feed-roll marks, and messy corrections - are not blurred, indistinct, or illegible

Number	Condition	Performance	Standard
206.01.07	Given responsibility for the care of a typewriter work station	the student will a. dust the machine and the desk b. clean typebars or element c. change the ribbon d. report the need for repairs according to the procedure established	to the satisfaction of the instructor
206.01.08	Given - blank 5" x 3" index cards - postal cards - appropriate simple source documents	the student will type the contents of the source documents on the cards	with - undiscernible correction of all errors - format following generally accepted pattern - content identical to source material
206.01.09	Given - individual blank labels - continuous form labels - appropriate lists of data	the student will type the contents of the lists on the labels	with - undiscernible correction of all errors - each item in the list on a separate label - format acceptable form - content identical to source

Number	Condition	Performance	Standard
206.01.10	Given letter or memo source material in - printed or typed arranged form - simple rough draft - handwritten rough draft - instructions regarding style	the student will type a transmittable copy (including carbon copies if indicated) of each item requested	meeting the following criteria: - undiscernible correction of all errors - completion at a rate equal to 1/3-1/2 of the student's average straight-copy speed - letters typed in the style specified - memos typed on the appropriate form or according to specified format - well-balanced placement - content of original and carbon copies identical to source material - word division according to standard rules
206.01.11	Given - No. 10 envelopes - No. 6 3/4 envelopes - a mailing list with on-arrival and special mail service notations	the student will type addresses (and special notations if indicated) on the envelopes	at a rate of approximately 1 envelope per minute and with - undiscernible correction of all errors - addresses located within the area read by optical character recognition equipment - special notations located to meet U. S. Postal Service preference
206.01.12	Given a request to type a letter or memo requiring an enclosure	the student will type the letter or memo indicating the enclosure with a notation, and will attach enclosure before submitting letter for evaluation	at least twice accurately (Note: Evaluation of enclosure handling should be made separately from production of the typed material.)

Number	Condition	Performance	Standard
206.01.13	Given a request to type a letter or memo requiring an enclosure	the student will type the items and arrange them for presentation to the individual who will sign the letter and memo	at least twice in accordance with standard operations (Note: Evaluation of arrangement for signature should be made separately from production of the typed material.)
206.01.14	Given signed letters or memos and Nos. 10 and 6 3/4 envelopes	the student will fold the letters or memos and insert them in the envelopes	meeting the following criteria at least twice for each envelope size: - letter is in matching envelope - letter is inserted in the correct way - letter is folded according to standard rules for envelope size used
206.01.15	Given - an edited rough draft of a 2-page manuscript with a footnote - instructions for style and binding. - access to a style guide	the student will type a final copy	in specified manuscript form and meeting the following criteria: - undiscernible correction of all errors - words divided according to standard rules - all editing notations followed - footnote according to style guide

Number	Condition	Performance	Standard
206.01.16	Given source documents and forms that require typing - on lines - in boxes - after guide words - in columns	the student will complete the forms (with carbon copies if indicated)	so that - all necessary data from source documents are transferred accurately to the forms - placement is neat and consistent - undiscernible correction of all errors
206.01.17	Given - a duplicator masterset - a one-page source document containing typed materials and lines or simple decorative material to be drawn by hand - placement instructions - correction aids	the student will type, draw, and make corrections on master	so that copies run from the master will meet the following criteria: - accurate in content - placement as specified in instructions - undiscernible correction of all errors - free of smudges and roller marks - entire copy legible
206.01.18	Given - material to be typed for thermal reproduction - placement instructions - correction aids	the student will type and make corrections on an original copy	so that a thermal copy will meet the following criteria: - accurate in content - entire page legible - undiscernible correction of all errors - placement as specified
206.01.19	Given - material to be typed for photocopy reproduction - placement instructions - correction aids	the student will type and make corrections on an original copy	so that a photocopy will meet the following criteria: - accurate in content - entire page legible - undiscernible correction of all errors - placement as specified

Number | Instructional Ideas | Notes

206.02.01 What shall we teach:

A. Quick, accurate control of the keyboard and major operative parts.

B. Major emphasis should be given to technique--early and often. Give more attention to observing students at work than to grading the copy they produce in the early hours of instruction.

How shall we teach:

A. Introducing the keyboard by more than one method provides reinforcement and maintains interest.

B. Subsequent to overviews of keyboard techniques and location of letters, numbers, and manipulative parts, students can continue development of skill by using individual progress materials. If they are used, constant teacher observation, encouragement, and assistance is an integral element of success. Practice makes perfect only if it is the right practice! Even when students are working on individual progress materials, it may be desirable for the group as a whole to do some drill together.

C. A student is ready to move on to production typing when he has achieved straight copy performance of approximately 25 wpm for 3-5 minutes with not more than 2 errors per minute.

D. If you have a one-handed student, he can be a typist with the help of a special keyboard text written just for him.

E. If you have foreign speaking students, consider recording text instructions in the foreign language and having students type from the English language textbook.

F. Give students familiarity with as many different typewriters as possible in your school setting. A student should not lead a life so sheltered that he expects all typewriters to be exactly alike.

Number **Instructional Ideas** **Notes**

206.02.02 What shall we teach:

A. Proofreading is more than drawing circles around errors; it is identifying the nature of the error and determining whether it can be neatly corrected. After students have learned the standard typewriting error rules, they should learn that some errors are more serious than others. (For a discussion of this latter point see 206.02.03.)

B. Teach proofreading/editing symbols. Textbooks and standard reference manuals give long lists of such symbols. While students should be familiar with most of these before they have completed a full typing program, they should work from rough draft copy that contains simple cross outs, circles with arrows for insertions, rewritten words, paragraphing marks, etc. Have students proofread their own work using symbols.

How shall we teach:

A. Present proofreading symbols by using overhead projector and discussion or prepare slide/tape presentation or a printed LAP. Give students a duplicated copy of the limited number of symbols you want them to use in the classroom.

B. Methods of proofreading:
1. Always proofread page before removal from typewriter, using the paper bail to guide the eyes as they examine each line when it pops into view above the bail.
2. Read two times; once for continuity, once for spelling. In the beginning, you may want to guide some students by reading the copy aloud to them as they check their copy.
3. Especially important typed work should be read by a team--the typist and a helper. Typist should read original copy as helper proofs the newly typed material.
4. A single uncorrected error is multiplied many times through duplication. For material that will be duplicated, use the triple check method to assure accuracy:
   a. proof in the typewriter
   b. proof after removal from the typewriter
   c. proof after first few copies of duplication

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206.02.02 (continued)

C. Have student dictate material on recording medium; he then listens to his own voice as he proofreads the final copy of his work. (This recording can often be saved and used as practice material for rough draft typing from recorded media.)

D. Give students a duplicated list of words--one column with all words typed correctly and the other with errors. Student compares columns and inserts proper proofreading symbol to indicate the needed correction.

E. After the first several weeks of instruction, have students use the proofreading symbols regularly as they proofread straight-copy timed writings. This gets them started early thinking about the nature of an error and the possibilities for correction.

F. Duplicate letters, tables, reports, etc., in which you have intentionally included errors. Early practice of this kind should be limited to locating typographical errors; next include some set-up errors (wrong margins, etc.); finally, include errors in judgment (using "Gentlemen" when "Dear Mr. Smith" should have been used, etc.).

206.02.03 What shall we teach:

A. Students should learn to use all common correction aids:
   1. Use typing eraser on most kinds of paper, but not when even carefully controlled pressure wears away too much of the paper surface.
   2. Use correction tape on paper that is approximately the same color (white, canary, blue, etc.) as the tape. Some "white" paper is not white--and correction tape leaves an obvious spot on the paper.
   3. Use correction tape only when another letter or word will be typed directly over the correction. A word typed too far to the right, for example, should not be corrected with correction tape.

Number Instructional Ideas Notes

206.02.03 (continued)

4. Use correction fluid on material where the original copy will not be seen by those to whom it is addressed. For example, it is very satisfactory in the preparation of an original for photo offset printing because the correction will be invisible on the final copies. Documents of a permanent nature should not be corrected with correction fluid as the errors may bleed through with age.
5. Erasable bond paper must be handled with care to avoid smearing the ink that does not dry as quickly as on regular paper.

C. Students should learn to correct errors at the moment they occur, double checking just before removing the paper from the machine for any overlooked errors; but they must also learn how to reinsert the paper and align with previous typing so that errors overlooked even in the double checking can be neatly corrected.

D. Students should learn to distinguish among major, minor, and trivial errors.
1. Major errors require retyping of an entire page.
2. Minor errors may be corrected by careful erasing.
3. Trivial errors may be ignored or corrected with pen or pencil.

What errors fit into each of these categories is open to debate, but the following list is representative of the typical business office.

MAJOR ERRORS INCLUDE:
1. Word errors that affect meaning (omitted, added, substituted, transposed, or repeated)
2. Misspelled words (particularly proper names!)
3. Noticeably poor correction (smeared, incomplete, hole in paper)
4. Incorrect word division
5. Grossly poor horizontal or vertical placement or violation of generally accepted format

206.02.03 (continued)

6. Too many typing errors on a single page (If there are enough of them, even carefully corrected errors are visible and detract from the overall attractiveness of the page.
7. Uneven left margin
8. Grossly uneven touch causing light and dark letters

MINOR ERRORS INCLUDE:

1. Noticeable,misaligned capital letters or other letters within words
2. Strikeovers that are noticeable
3. Failure to capitalize
4. Omitted hyphen
5. Typographical errors (misstrokes within words or figures)
6. Spaces within words ("Spreading" can be used to correct this error.)
7. Irregular indention of paragraphs (Depending on exact nature of the error, "spreading" or "squeezing" will often correct this error.)
8. Omitted space between words ("squeeze" to correct)

TRIVIAL ERRORS INCLUDE:

1. Two spaces between words
2. Irregular spacing after punctuation mark
3. Omission of comma (careful use of pen or pencil will correct this error)
4. Nearly invisible strikeovers
5. Item slightly crooked on the page
6. Uneven right margin (extreme unevenness may require retyping)
7. Slightly elevated capital letters
8. Samll deviations from good placement or generally accepted format

E. Students should learn to "squeeze" and "spread."

Number Instructional Ideas Notes

206.02.03 (continued)

How shall we teach:

A. Error correction is an integral part of typewriting. No one types perfectly all the time. The more practice a student gets correcting errors under teacher guidance, the quicker and better will be his corrections--and the better his finished copy will look. Consider introducing error correction soon after production activities begin; continue error correction in most of the remaining production work. No erasing on introductory practice of such tasks as letter or table typing is necessary. Erasing on the remaining tasks in a production unit or LAP will build skill in producing the truly transmittable ("mailable") copy expected of the typist.

B. Build error correction into some 3- and 5- minute timed writings to encourage students to make corrections quickly.

C. Teach the correct use of each correction aid through demonstration to a group of students, to individuals, or through audiovisual aids which take the student step by step through the correction process. Reenforcement must come through teacher observation and prescription at each student's typing station; it is better to do it this way than to rely on red marks on student papers.

D. To teach reinserting, aligning, filling in missing letters, squeezing, and spreading, prepare duplicated copies of lines requiring such tasks.
   1. Type drill sheet using same kind of typewriter student will be using when asked to do the drill.
   2. Provide several drill lines for each task.
   3. Drill should be repeated frequently throughout student's time in typing program; if it is not, the typical student will forget to use these techniques to correct errors and will retype many pages of work that would otherwise qualify as transmittable copy.

Number Instructional Ideas Notes

206.02.03 (continued)

4. Sample lines:
   Directions--Reinsert and type directly over the sentence below:

   "Your typing should be on top of this line."

   Directions--Reinsert this paper and fill in the missing letters:

   "You can do th s very accurately w th prac ice."

   Directions--Reinsert this paper and "spread" the word may to fill the blank space:

   "He will come home tomorrow night."
   "He   come home tomorrow night."

   Directions--Reinsert this paper and "squeeze" the word will to fill the blank space:

   "He may come home tomorrow night."
   "He   come home tomorrow night."

206.02.04 What shall we teach:
   What is a rough draft
   Proper usage of rough draft
   Making corrections, additions, and omissions while typing the rough draft
   Making corrections, additions, and showing new placement of material through the use of proofreading symbols
   What format is used for the rough draft

Number Instructional Ideas Notes

206.02.04 (continued)

How shall we teach:

A. Probably the hardest concept for the student to understand is that of the rough draft. Careful attention must be given to the idea that some work must be typed and retyped as a result of rewording, omitting, rearranging, and adding data; and, incidentally, typing errors. Many students want final copy on first attempts and are reluctant to use the rough draft. They must be convinced of the time saved through the use of a rough draft. X'ing out procedures should be discussed thoroughly, making certain the student uses the alternate x and m for speed if not using an electric with a typomatic x.

B. Provide students with a list of proofreading symbols. The average businessman does not know all the editing marks as shown in the textbook. Ask for samples from local businessmen. Compile this list and teach your students these proofreading marks or techniques.

C. Begin by using one or two proofreading marks in short, teacher-prepared sentences of interest to students; such as, current school announcements of activities, current affairs, short poems, or jokes.

D. As students master the first proofreading marks, new marks should be added until the list is complete.

E. For handwritten material, use student samples, obtaining as many as possible.
   1. Ask students to write drill sentences or short paragraphs, book reviews or news releases.
   2. If you started your student in typing with a timed writing in longhand, you will already have in your possession samples of each student's handwriting for source copy.
   3. Use the student who has finished an assignment and doesn't want to start something new or the "broken-finger-can't-type-today" student, or short day schedule to get specimens of handwriting.
   4. Ask students to bring in handwritten English assignments, such as book reports to be typed.

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206.02.04 (continued)

F. When student has completed first rough draft:
   1. Comment only on ways corrections were indicated; do not comment on number of errors made.
   2. Indicate any corrections that have been overlooked through the use of proofreading marks.
   3. Insert words, punctuation, paragraphs, and notations.
   4. Return edited rough draft to student after a short period of time has lapsed.
   5. Instruct student to type a second rough draft--be certain he understands this is to be a rough draft also.
   6. If it is desirable to carry this exercise further, review second rough draft making changes as necessary and then ask for a final copy.

206.02.05 What shall we teach:

A. Students should learn that there are some absolute rules of word division and some preferred rules. Major textbooks, secretarial handbooks, and word division manuals identify these absolute and preferred rules in approximately the same way.

B. Students should learn that incorrect word division is a major error making a page of typed work unusable.
   - "Incorrect" should be understood to mean in violation of the absolute rules of word division--not the preferred rules.

C. Students should be introduced to the word division manuals as tools that are as necessary to the good typist as the typewriter itself.

How shall we teach:

A. Use learning materials in workbooks when they are available, but also provide a printed summary of the basic rules--perhaps on a 3 x 5 card that a student could carry in a wallet or purse; such as:
   1. Don't divide if you can avoid it!
   2. Divide only between syllables.

Number Instructional Ideas Notes

206.02.05 (continued)

3. At least 2 letters at end of line and 3 characters carried forward to next line.
4. Divide near the middle of a word when possible.
5. Divide proper names, dates, addresses with logical readability in mind.
6. Avoid dividing abbreviations and figures.

B. Be sure that much drill material requires the typist to make word division decisions. It does little good to introduce the word division rules and then provide students with timed writings, letters, and reports that are relatively free of the need to divide words.

C. Slide/tape presentations of word division are available that provide an alternate way of introducing these rules.

D. Some students find it difficult to decide where to end a line of typing and this complicates the word division decision. Often the problem is hearing the margin bell. A visible signal can supplement the bell for students who have trouble with the margin bell. Slide the right paper bail roller to a position so that the center of the roller is at the point where the average line should end. (Example: With margins set at 20 and 85, the average line should end at 80; position the roller so that it is centered on 80.) The left end of the roller then marks the point at which the shortest line should end; the right end marks the point beyond which no typing should appear. (Example: Shortest lines end about 76; longest lines end about 84.)

E. Have as many copies of word division manuals available as possible. Suggest that students, particularly advanced students, buy their own copies.

Number Instructional Ideas Notes

206.02.05 (continued)

F. Tests of word division skill that require the student to indicate the acceptable point of division probably should not include division problems that are so rare that even an experienced secretary (or typing teacher) would have to refer to a word division manual to be sure. If such words are included, students should be permitted to refer to a word division manual.

206.02.06 What shall we teach:

A. Students should have practice
   1. making single carbon copies with standard carbon paper
   2. making multiple carbon copies (but there is less and less reason to practice more than 3-5 copies with increasing use of photocopy equipment)
   3. methods of quick and efficient assembly of multiple carbon packs (i.e., "machine assembly" and the "trough" method that uses the flap of an envelope to ease the paper pack into the machine)
   4. using snap-apart carbon packs--including how to snap them apart and dispose of the used carbon
   5. using carbonless paper (drill probably limited by the cost of materials)
   6. selecting and using the proper correction aids for carbon copies
      a. Special correction tape must be used for carbon copies.
      b. Using a different eraser for copies than for original; usually a pencil eraser.
      c. Cleaning eraser on an emory board, small piece of fine sandpaper, or by rubbing it on a piece of scratch paper.
      d. Protecting other copies while erasing on one.
   7. correcting errors on carbon copies after papers have been removed from typewriter
      a. Each copy, beginning with last one, should be reinserted separately for correction; it is difficult, if not impossible to reinsert entire carbon pack and realign every copy.

Number Instructional Ideas Notes

205.02.06 (continued)

How shall we teach:

A. Making carbon copies is part of the real work of typewriting. Introduce carbons early in production--considerably before the end of the first "semester" of typing in a traditional setting.
   1. After carbons are introduced, students should be taught to make at least a file carbon copy of every production task unless specifically directed not to do so.
      a. This approach permits you to omit carbons when the purpose of a production activity is, for example, simply to introduce tabulation typing. But after specifically omitting carbons in the introductory practice, be sure students begin making carbons again.

B. Textbook explanations and illustrations of carbon paper use are not adequate for other than single copies. Teacher demonstration to a group of students or to an individual student is necessary. Such a demonstration could be effectively done in a slide/tape or film loop presentation.

C. Advanced students can combine their typing practice with application of their filing skills by filing carbon copies under alphabetic, numeric, or subject matter file systems set up in the student's own binder or in an available file drawer in the classroom.

206.02.07 What shall we teach:

A. Students should learn to clean the typewriter at least as often as any schedule calls for and, more importantly, whenever the typewriter/work station needs cleaning.

B. The entire desk top including under the typewriter should be regularly cleaned. Typebars or element should be cleaned and exterior parts of machine dusted.

Number Instructional Ideas Notes

206.02.07 (continued)

C. Students should learn how to change ribbon and when to change ribbons.

D. Students should understand that typewriters do break down and should be taught the most common kinds of problems. Teach them the method used in your school to report repair needs, and let them do the reporting.

How shall we teach:

A. Work with individuals or very small groups on machine and work station care. Slide/tape presentations are possible.

B. Show students the several different methods for cleaning typebars, but concentrate your attention on the method and cleaning materials used in your school.

C. Show samples of dirty type: filled in "o" or "e," for example.

D. Have cleaning supplies located for easy and regular access by students; after first introduction of cleaning, regularly remind individual students to clean desk/typewriter as needed.

E. Show students how to fill out a repair request form and where it should be placed for the repairman. Don't fill these out when the student can do the job.

206.02.08 What shall we teach:

A. Typing near the top and bottom edges of cards. On some machines the card holders swing up and down; students need to know that.

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206.02.08 (continued)

B. Cards provide a means to teach vertical and horizontal centering on odd-sized paper and centered displays are not uncommon on typed postal cards, particularly those that are duplicated.

C. Provide early and continuing practice in working with three- and four-line addresses arranged in the same way as on letters and envelopes.

How shall we teach:
A. Introduce cards as early as possible--before letter and envelope typing--so that the address practice is of the most value to beginners.

B. Don't limit all "card" practice to typing on slips of paper cut to card size; cards feel different to the student and they respond differently in the typewriter.

C. In advanced units on card typing, combine the typing practice with filing practice. Give students a mailing list that is not in order. Have them type cards and then file them in alphabetic, numeric, or geographic order. They can place the properly arranged cards in a small envelope for submitting to you for grading purposes.

D. Typing a mailing list provides a good opportunity to teach desk organization; materials supply in one place; copy in another; finished cards in still another specified location.

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206.02.09 What shall we teach:

A. Labels come in many sizes and shapes; some are larger than 5" x 3" cards and others are small enough to fit on a file folder tab. Some are individual pieces of paper, some come in a roll, and others come several to a page. Students should have some practice on each kind.

B. Teach that the most efficient way to type labels is on some continuous form sheet or roll. Also teach advanced students the pleated sheet of paper method of holding single labels in the machine for typing.

How shall we teach:

A. Labels, like index cards, can be introduced early and used often for quick drill on address typing. This combines two goals in one efficient drill.

B. If you need labels typed for file folder, packages, etc., give the job to a student.

206.02.10 What shall we teach:

A. Personal business letters should be taught both for the motivational value and the fact that typists are asked by employers to type such letters on occasion. Teach that even personal business letters should normally have a file carbon copy made.

B. There seems to be little justification for teaching more than two (at most three) letter styles--blocked (modified block) semiblocked (modified block with paragraph indentions), and full blocked (block).

C. Teach "standard" and "open" punctuation styles to the point where all students who complete the program know exactly what they are and how to use them. The "closed" style is a waste of time.

D. By the time a student completes the program he should be comfortable working from handwritten and rough draft copy; most typing in offices is done from such copy.

Number **Instructional Ideas** **Notes**

206.02.10 (continued)

E. A typist should know how to estimate letter length; he should not have to rely on instructions in a textbook or from his teacher or supervisor to decide whether a letter is short, average, or long.

F. He should also know how to lengthen and shorten the appearance of a letter to achieve a balanced look on the page. He won't learn this unless you provide typing tasks that force him to make those decisions.

How shall we teach:

A. Early practice materials should be designed to provide maximum practice on letter form; this means the body of letters should be kept very short at the beginning.

B. If the textbook does not contain enough handwritten copy, duplicate handwritten letters. So that students get practice in working from a variety of handwritten copy, you could ask each student to write one letter in longhand on a fluid duplicator master. Do this in several classes over a year or two and you'll have plenty of handwritten copy.

C. Even if students are progressing individually, give timings on letters and letter parts at intervals. At any one time, there will be several students who can benefit from such timings. When every student has completed the first unit on letters, timings are appropriate for the entire group from that point on.

D. Be sure that most, if not all, letters typed in the advanced phases of the typing program require the student to decide the letter length. There are four steps in estimating letter length:

Number Instructional Ideas Notes

206.02.10 (continued)

1. Select 4 lines of copy at random and count the number of actual words in each of the 4 lines.
2. Divide the total words in those 4 lines by 4 to find the average number of words per line.
3. Multiply the average number of words per line by the total number of lines in the body of the letter to find the approximate length of the copy. If necessary, adjust this figure as follows.
4. If copy appears to have more than the normal number of long words, add 10 percent to estimate. Add 20 words to estimate if letter has attention line or subject line. Add the words that appear in any postscript.

E. Students should make carbon copies regularly after the initial letter instruction is completed. Advanced units should call for up to 3-5 copies some of the time. Don't pass up carbon work as being too much trouble; it is too important.

F. After students have been taught addressing envelopes, attaching enclosures, arranging letter and envelope for signature, and folding and inserting, these tasks should be regularly combined with letter production.

G. Early instructions should be very complete; there should be much teacher prompting. Gradually decrease the prompting and the instructions until students are receiving little, if any, more help than they could expect in an entry-level job.

H. Students should have access to a "teacher's" key for immediate confirmation or correction of their placement decisions. This does not mean that students should see the correct version before making their own attempt; limit access to the key until after the student has typed a letter or until he has encountered an aspect of the task that he cannot handle without checking the key.

Number Instructional Ideas Notes

206.02.11 What shall we teach:

A. The traditional textbooks provide adequate explanations for beginners, but should be supplemented with practice at quickly estimating the location of the envelope address instead of counting down an exact number of lines and over an exact number of spaces.

How shall we teach:

A. Introduce envelopes almost simultaneously with the introduction of business letters; students should rarely type a letter without also typing an envelope.

B. Don't limit all envelope typing to the simulated envelopes that are often printed on the back of textbook letterhead paper. A real envelope responds differently from those simulated ones, and the student needs practice in the real thing.

C. Be sure that advanced students get practice in preparing envelopes for carbon copy addressees; students often prepare multiple carbons without having to follow through on the disposition of those carbons.

D. After telling student (in a group, as part of a LAP, or through a slide/tape presentation) that an envelope address begins 2" down and 2 1/2" across, have him space down and across by estimate to the point he thinks is correct. At that point he types a period. Then he can be told that 2" down is about 12 lines and 2 1/2" across is about 25 (pica) to 30 (elite) spaces. He then checks his estimate by counting down and across to see how close he came. If he drills this way several times, he should develop the needed confidence to use estimating as a placement method.

Number Instructional Ideas Notes

206.02.12
206.02.13
206.02.14

What shall we teach:

A. Before a student finishes his typing program, he ought to understand that an enclosure is something more than just a word typed at the bottom of a letter or memo. Enclosures are often copies of other letters that the typist has prepared or some duplicated or printed form that is regularly enclosed with letters from a particular firm.

B. The student should recognize several correct ways of indicating enclosures.

C. Typists should see the letter as part of a unit of correspondence that includes the envelope, the required number of carbon copies, and any specified enclosures. Practice should be given in arranging these materials for presentation to the dictator for his signature.

D. Students should know how to fold for insertion in standard envelope sizes.

How shall we teach:

A. For early enclosure practice, have duplicated copies of enclosures in a spot where students can pick up a copy for attaching to their letters. Later, students can type, for example, two letters. The first letter has a carbon copy notation; the second letter is a letter of transmittal to accompany the carbon copy of the first. Thus, a student is forced to actually dispose of the carbon copy and properly handle an enclosure.

B. Don't try to introduce every possible enclosure notation at the beginning. The student needs to know "Enclosure," but it is only nice for him to know "Enclosure: Report No. 2."

C. Have advanced students submit finished work to you as they would be expected to in a business office; that is, have them put the letter, envelope, etc., on your desk or in an "IN" box in specified arrangement rather than passing papers in by rows or some other school-oriented method.

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206.02.15 What shall we teach:

A. Proper format

B. How to use and prepare backing sheets

C. Proper footnote placement and format

D. Use of superior numbers

E. Use of single-space quoted material

How shall we teach:

A. Drill on individual parts of the manuscript rotating paper to facilitate practice on:
   1. starting the first page--title and first paragraph
   2. quoted material
   3. proper footnote placement
   4. second page heading and first paragraph

B. Use commercially or teacher prepared transparencies. Overlays help to illustrate step-by-step instruction.

C. Slide/tape presentations allow the student to work individually and at his own pace.

D. Begin with simple one-page reports or manuscripts working toward the more complex.

Number Instructional Ideas Notes

206.02.16 What shall we teach:

A. It is impossible to give students practice on all printed forms. Almost every company has its own forms. If you give a student practice on forms that require him to type on printed lines, to type within boxed areas that necessitate some squeezing, after printed guide words, and in vertical columns, a student should be able to handle any new form he may encounter in an entry-level job.

B. This area calls for extra emphasis on accuracy because of the statistical nature of most forms.

How shall we teach:

A. Collect printed forms from local business firms that provide the kind of practice outlined above. Ask for permission to reproduce the forms (with a note such as "void" or "for instructional use only" added) using an electronic stencil maker or similar device. Don't overwhelm students with a multitude of forms. Have just enough variety to cover all problems that are typically encountered when typing forms.

B. It is difficult to justify setting universal time standards for forms because they vary so much. It may be possible to develop appropriate standards for the forms used by keeping an accurate record of student completion time for a year or two, but don't try to apply those standards to other forms.

Number | Instructional Ideas | Notes

206.02.17 What shall we teach:

A. advantages and disadvantages of fluid duplicating process

B. mastersets and separate duplicator carbons (including colored carbon in addition to the traditional purple)

C. removal of protective tissue*

D. insertion of open end of masterset into typewriter for ease in correcting errors

E. correction procedures using
  - cellophane tape
  - correction tape
  - razor blade
  - correction pencil

F. insertion of protective tissue when removed from typewriter

G. clean-up procedures
  - ditto soap for hands
  - ditto fluid for typewriter

*If mistakenly left in place during the typing of a master, the protective tissue can usually serve as the master if a limited number of copies are needed.

How shall we teach:

Teacher explanation and demonstration is effective if well planned and complete; but in learning centers with a variety of activities, additional teaching methods are needed to provide ways for students to learn independently. Suggestions include programmed instruction and slides or filmstrips with record or tape. These programmed materials and audiovisual aids can be commercially prepared or teacher prepared.

Number | Instructional Ideas | Notes

206.02.18 What shall we teach:

A. Principles of thermal process

B. Colors that reproduce (generally black is the only color that will reproduce on a thermal copier; anything typed with red or marked on the copy with another color probably will not reproduce.)

C. Kinds of copies that can be made on a thermal copier (single copy, fluid duplicator master, mimeograph stencil, overhead transparency.)

D. Corrections (copy can be cut and patched with cellophane tape on the back or with rubber cement. All paper used for a given page, however, should be the same kind and color.)

206.02.19 What shall we teach:

The primary difference between typing copy for a photocopier and any other typing of an original is that corrections can be made in different ways. Copy can be cut and patched (with rubber cement or by cellophane tape on the back) for some models of copiers. When this technique is used, all paper used for a given page should be the same kind and color. Corrections may also be made with white correction fluid (even on colored paper with some machines). Students should also be told or shown that some combinations of colors do not reproduce well on a photocopier. For instance, goldenrod paper should not be used for typing a document that is to be photocopied.

Number	Condition	Performance	Standard
207.01.01	Given a Business Behavior Guide for the classroom	the student will note his strengths and weaknesses	for discussion with the instructor
207.01.02	Given three copies of an employee rating form used in industry	the student will rate himself and compare his rating with that received from the teacher and a peer	for discussion with the instructor
207.01.03	Given four role-playing situations involving - employer/employee - employee/employee - employer/subordinate - employee/public	the student will participate as the "employee" in all four situations	with the performance judged to be compatible with acceptable business behavior - realistic and having created a positive reaction - to the teacher's satisfaction

Number	Instructional Ideas	Notes
207.02.03	Audio or videotape the performance for analysis. A collection of these tapes can be used for demonstrations. Ideas for situations may be solicited from employers, former students, work experience coordinators, or taken from publications.	

BUSINESS BEHAVIOR GUIDE

In order to be prepared to hold a position in the business world, it is important that you acquire the attitudes and work habits which are basic to efficient performance. Listed below are some items on which you may be evaluated:

Punctuality and Promptness

1. Prompt arrival to class
2. Prompt response to signals
3. Work submitted on time
4. Regular attendance

Responsibility

1. Required tools and material brought to class daily
2. Homework completed on time
3. Projects completed on due date
4. Make-up work because of absence turned in without a reminder
5. Attention given to assigned duties
6. Careful use of materials and equipment
7. Calculations checked
8. Proofreading of all typing

Cooperation

1. Volunteering services
2. Accepting assignments graciously
3. Participating in class discussions and activities
4. Assisting other students in group work
5. Developing a "team spirit" in class

Honesty

1. Homework and other assignments prepared independently
2. Honest reasons given for defects and mistakes
3. Lost articles returned to teacher

BUSINESS BEHAVIOR GUIDE (continued)

Efficiency

1. Keeping necessary materials together
2. Keeping desk neat
3. Arranging and handling tools and materials
4. Preparing working environment and space
5. Apportioning time
6. Exercising common sense and judgment in carrying out assignments

Industry, Perseverance, and Self-reliance

1. Application to the job at hand
2. Development of the ability to concentrate on tasks
3. Ability to carry through an assignment to completion
4. Development of good routines
5. Development of initiative--the facility to determine what work should be done without being told

Emotional Stability

1. Ability to see the other side
2. Capacity to control mental and physical responses to situations
3. Feelings not easily hurt
4. Sense of humor

Tact and Discretion

1. Saying and doing the right thing at the right time
2. Avoiding gossip
3. Ability to deal with others without giving offense

Loyalty

1. Taking pride in being associated with the business, regardless of the level on which you serve
2. Giving of time freely
3. Respect for those at the head of the organization

BUSINESS BEHAVIOR GUIDE (continued)

Personal Appearance and Physical Fitness

1. Appropriate grooming and dress
2. Cleanliness of person and attire
3. Attractive, becoming, and appropriate hair style
4. Attractive and appropriate make-up
5. Good health habits
6. Pleasant facial expression

Attitudes

1. Pride of workmanship
2. Cheerfulness
3. Willingness to work and cooperate
4. Desire for improvement

Number	Condition	Performance	Standard
208.01.01	Given a letter without paragraph designation	the student will paragraph the letter	into logical units to teacher's satisfaction
208.01.02	Given 10 compound/complex sentences with punctuation omitted	the student will punctuate the sentences	with 90% of the sentences punctuated accurately

NOTE: No Instructional Ideas were included for this module.

300. GENERAL OFFICE CLERK

Competency Modules

301. Adding Machine
302. Filing and Retrieving
303. Mail
304. References, Manuals, Directories, Catalogs
305. Simple Business Records
306. Telephone

Number	Condition	Performance	Standard
301.01.01	Given a 10-key adding machine and 10 business problems involving addition, subtraction, and multiplication	by the touch system the student will compute the answers	at a rate of 100 strokes per minute (spm) with 90% accuracy
301.01.02	Given a 10-key adding machine and 5 problems resulting in a credit balance	the student will compute the answers, using the touch system	with 80% accuracy
301.01.03	Given a 10-key adding machine, a conversion table, and 5 problems involving fractions	the student will use the table to convert the fractions to decimals and compute the answers using correct fingering	with 80% accuracy
301.01.04	Given a 10-key adding machine and 5 problems involving multiplication of decimals	the student will compute the answer using the correct fingering, determine the decimal placement, and round off the answer to the nearest hundredth	with 80% accuracy
301.01.05	Given a 10-key adding machine and 5 problems involving percent	the student will compute the answers using the touch system, determine the decimal placement, and round off to the nearest hundredth	with 80% accuracy
301.01.06	Given a 10-key adding machine and problems combining whole numbers, decimals, and fractions	the student will compute the answers using the touch system	with 80% accuracy

Number	Instructional Ideas	Notes
General:	A. Have students solve problems involving discounts (cash and chain) extensions, depreciation, interest (simple and compound), commissions, payroll, mark-ups/markdowns, etc.	
	B. Show films, filmstrips; play tapes from commercially prepared sources.	
	C. If a model store or office is available, participate in the operations utilizing the adding machine. Have students do computations for teachers and departments.	
	D. Give out pamphlets or post pictures of equipment from vendors of adding machines.	
	E. Prepare audio tapes and/or videotapes demonstrating adding machine operations.	
	F. Assign observations of equipment used in offices.	
	G. Students may survey offices regarding the various uses of adding machines.	
	H. Work out procedures for short-cut multiplication with paper and pencil; then do the operation on the adding machine.	
	I. Have students keep a record of their speed growth pattern.	
	J. See Common Core Competency 101, Adding Machine.	

Number	Condition	Performance	Standard
302.01.01	Given 30 documents	the student will place all documents alphabetically in the files and in chronological order within each folder	with 90% accuracy within 40 minutes
302.01.02	Given 15 numbered documents	the student will place all documents numerically in the files and in chronological order within each folder	with no more than 2 items out of place within 20 minutes
302.01.03	Given 15 documents	the student will file all documents by subject and in chronological order within each folder	with no more than 2 items out of place within 20 minutes
302.01.04	Given 15 documents	the student will file all documents geographically and in chronological order within each folder	with no more than 2 items out of place within 20 minutes
302.01.05	Given 15 documents requiring follow-up action	the student will arrange the documents in chronological order	with no more than 2 items out of place within 8 minutes
302.01.06	Given 10 requests for retrieval of file folders	the student will retrieve files requested and record removal	with 90% accuracy within 15 minutes
302.01.07	Given 10 uncoded documents and the procedure for coding	the student will code the documents	with 90% accuracy within 20 minutes
302.01.08	Given 10 documents to be cross-referenced, cross-reference sheets, and file folders	the student will complete a cross-reference sheet for each document, and file the documents and cross-reference sheets	with 90% accuracy within 30 minutes

Number	Condition	Performance	Standard
302.01.09	Given 10 documents, new file folders, and index cards	the student will prepare new folders and cross-index cards	with 90% accuracy within 20 minutes
302.01.10	Given a request for a copy of a filed document	the student will remove the document and make requested copy or indicate procedure for having copy made	with 100% accuracy within 10 minutes
302.01.11	Given 5 requests for removal of documents from the file area	the student will complete a checkout record for each document	accurately within 10 minutes
302.01.12	Given a request for information contained in filed documents	the student will abstract requested information from the files	accurately within 15 minutes

Number	Instructional Ideas	Notes
302.02.01 302.02.02	This is a good place to begin the use of a practice set. Use a full-size filing system to give the students hands-on experience. The No. 25 Smead Training Unit provides this experience nicely. If a student has trouble reaching the standard, some timed drills should be of great help.	
302.02.03 302.02.04	An efficient method of handling geographic and subject filing is to have students read and study textbooks and then proceed to a practice set. If a student cannot pass the performance standard the first time, he could complete some of the chapter activities in a text.	
302.02.05	The student should do some drills in operating a tickler or pending file system. Stress should be placed on the importance of a follow-up system and being able to locate checked out documents. A discussion on various types of pending file systems and equipment would be helpful. A teacher should keep examples on hand to illustrate the uses for which three of the major filing systems are used: (a) subject files: statistical reports, catalogs, price lists, personnel data, as well as to correspond with an alphabetic system; (b) numeric files: policies, orders, stock inventory, court cases, contracts, operation systems, voucher number, as well as to compliment an alphabetic system; (c) geographic: direct mail advertising, salesman's territory, real property location, foreign correspondence, government, branch office companies, as well as to compliment an alphabetic system.	
302.02.06	One test for this objective is to have the students retrieve from the files used in the practice set or a model class set such as the No. 25 Smead Training Unit.	
302.02.07	At this point students should be taught how to prepare materials for filing.	

Number | Instructional Ideas | Notes

302.02.08 Give students several problems using cross-reference materials. Establish the following procedures for cross-referencing:

1. Complete cross-reference sheet as follows:
   a. name of subject matter of document
   b. brief statement of purpose or subject of document
   c. date of document
   d. cross-reference
2. File original document
3. File cross-reference sheet(s)

Break down cross-reference problems into simple parts and then move on to more difficult jobs. Cross-referencing of practice set materials can be used. The teacher may find it easier to cover cross-referencing as part of the total filing system rather than a separate topic.

302.02.09 Include rationale for "new" folders. Introduce the various filing supplies. Include types and cuts of folders, guides, labels, and various commercial filing systems. The student should be shown how to prepare a file label and attach it to the folder. This is a good time to discuss the use of the miscellaneous folder and when to throw out folders no longer needed. To prepare the actual folders the student should:

1. Determine primary indexing unit for documents
2. Type appropriate label
3. Attach label to folder
4. Place folder in file
5. Cross-reference folder

The students will find it helpful if the teacher has collected an example of the various types of guides: Alphabetic, Geographic, Numeric, Tickler (monthly, daily), Primary, Secondary, Special, and Out.

The students also find it helpful to have examples or a list of various types of files found in the school or the more sophisticated ones which nearby businesses use such as: shannon board, clipboard, horizontal, shelf, electrofile, card index, tickler, bellows, box, spindle, pigeon hole, transfer (periodic and perpetual), active, inactive, microrecord, and automated.

Number | Instructional Ideas | Notes

302.02.10 The student should perform this task after he has learned to retrieve the requested documents. Although this task may seem simple enough, it is one of the most frequently occurring jobs for the general office clerk. The student should be drilled in following these procedures:

1. Locate document
2. Separate pages of document
3. Make requested copies
4. Collate
5. Fasten pages together
6. Re-assemble and file copies document(s)
7. Return copied document(s) to file
8. Deliver copies to requestor

302.02.11 Accuracy in recording the check out information is most important. Suggested procedure is:

1. Enter name or subject of material
2. Enter date of document
3. Enter date borrowed
4. Enter name of borrower
5. Enter date returned

302.02.12 Studies indicate that many entry-level positions require the worker to perform this task. Students should learn to:

1. Locate appropriate folder
2. Search folder for requested information
3. Record information:
   a. date of document
   b. name or subject of document
   c. requested information
4. Collate information in chronological order
5. Deliver information

The teacher may prepare some duplicated sheets using the above outline and then give the students some documents that they could use for practice.

Number	Condition	Performance	Standard
303.01.01	Given - 10 pieces of domestic mail - postage scale - 1st, 2nd, 3rd, and 4th class postage rate charts	the student will identify which of the 4 classes applies to each piece of mail, weigh, and determine postage for each piece of mail	with 90% accuracy in 20 minutes
303.01.02	Given a list of 10 parcel specifications by weight, size, zone, and a parcel post chart	the student will use the chart and identify those parcels that are acceptable by postal regulations for mailing and determine the correct postage for those parcels	with 90% accuracy
303.01.03	Given a description of 20 items to be mailed	the student will identify those that may be mailed at the 4th class rate	with 90% accuracy
303.01.04	Given an item and the address to which it should be mailed	the student will wrap, seal, address, and determine postage for the package	meeting postal standards
303.01.05	Given - 20 pieces of specialized mail - postage scale - mail charts for determining postage for specialized services	the student will determine the postage for the following: a. special delivery b. special handling c. combination d. registered e. certified f. insured g. C.O.D. h. certificate of mailing	with 90% accuracy in 45 minutes
303.01.06	Given 10 envelopes, addresses, and an official Zip Code Directory	the student will address the envelopes	with at least 9 envelopes correctly addressed

Number	Condition	Performance	Standard
303.01.07	Given 10 envelopes	the student will seal and stamp the envelopes	efficiently
303.01.08	Given 100 envelopes	the student will pre-sort by Zip Code, bundle, and tie the letters quantities, labeling if necessary	according to bulk mailing regulations

Number	Instructional Ideas	Notes
303.02.01	Demonstrate how to use the mail scale and how to read postage rate charts. Obtain pamphlets and brochures from the U.S. Postal Service.	
303.02.02	Prepare transparencies from postal brochures or mimeograph samples to teach determination of parcel post regulations.	
303.02.03	Distribute instructions obtained from the post office concerning 4th class rates. Discuss the special rates on films, printed music, texts, recordings, manuscripts for books, periodical articles, and other printed materials.	
303.02.05	Explain and demonstrate the various special mailing services provided by the U.S. Postal Service, United Parcel Service or other private postal companies.	
303.02.06	For use of the Zip Code Directory refer to the unit on REFERENCES, MANUALS, DIRECTORIES, CATALOGS.	
General:	A. Invite guest speaker from the local post office to speak on postal regulations and distribute brochures and pamphlets. B. Take a field trip to local post office or a large office that has a mail department. C. Have a vendor demonstrate mechanical mail handling equipment.	

Number	Condition	Performance	Standard
304.01.01	Given a standard secretarial handbook and 10 questions	the student will write the page number on which the answer is found	accurately
304.01.02	Given an almanac and five requests for information	the student will write the answers, giving the page number on which this information is found	accurately
304.01.03	Given a hotel-motel directory and the names of 3 cities	the student will list the name, address, telephone number, and rates for 2 motels or hotels in each of the cities	accurately
304.01.04	Given a thesaurus and a list of 5 words	the student will write 3 synonyms for each word on the list	accurately
304.01.05	Given an atlas and a list of cities/counties	the student will list the population, sq. miles covered, state in which located, and elevation	accurately

Number	Instructional Ideas	Notes
304.02.01	Obtain desk manuals from local companies and have the student find different types of information. Public utility companies are normally good sources for this. Have discussion on pertinent office problems using a handbook as a basis for comments.	
304.02.02	Have the student read the foreward and in a short paragraph explain the purpose of the reference. The instructor could prepare a list of questions (What is Jack Benny's real name? What was the rainfall last year in Denver, Colorado?) answers to which could be found by using an almanac. Have the student use the index and/or table of contents to find information on subjects in which he is interested.	
304.02.03	Have the students plan motel accommodations for a trip.	
304.02.04	Take a paragraph from a book, underline certain words, have the student rewrite the paragraph replacing the underlined words with substitutes taken from a Thesaurus. Give the students a list of words and have them list one antonym, or negative form for each.	
304.02.05	Have students examine various atlases noting the differences in completeness, ease of locating information, ease in reading, etc. Design problems which give the student experience in locating major centers of population, information about the area, etc. Students may be assigned oral or written reports on different sections of the atlas.	

For objective on postal manual, see General Office Clerk Competency 303, Mail.

Number	Condition	Performance	Standard
305.01.01	Given source documents, deposit forms and a single-entry cash payments journal	the student will a. verify amounts received b. endorse checks c. complete deposit form d. obtain record of deposit e. record information in single-entry journal	accurately
305.01.02	Given completed cash sales slips, credit sales slips, cash register tape, credit memos, proper journal form and summary report form	the student will a. verify computations b. record data in journal c. total and/or balance journal d. prepare a summary report	with 90% accuracy
305.01.03	Given instructions for time cards, payroll summary sheets, and payroll vouchers	the student will a. complete time cards b. compute wages or salary and/or piece-rate wages, deductions, and net pay c. record payroll data on summary sheets d. prepare payroll vouchers	with 90% of the payroll vouchers prepared legibly, amounts calculated accurately, and items placed correctly
305.01.04	Given incoming stock records, invoices, bills of lading, and stock and inventory cards	the student will a. verify data b. record on stock and inventory cards c. balance information on the correct forms	calculated accurately
305.01.05	Given outgoing stock records, requisitions, purchase orders, and stock and inventory cards	the student will a. verify and proofread data b. complete invoice c. record in proper record form d. balance proper record form	calculated accurately

Number	Instructional Ideas	Notes
305.02.01	Obtain for student use: 1. blank bank deposit slips 2. the unit on checks, deposits, etc., from the California Bankers Association	
	Prepare a set of transparencies showing the flow of money as represented by a check from the time it leaves the writer's hands until the canceled check returns.	
	Prepare a bulletin board display or transparencies showing: 1. checks to be listed on a deposit slip 2. deposit slip with checks 3. a bank statement showing deposits (including the one shown in No. 2) and checks 4. a single entry record in which deposits are recorded including the one in No. 2	
	Plan a field trip to a local bank requesting that the tour emphasize bank deposits and statements.	
305.02.02	With the permission of a local merchant, develop a set of sales slips with the company form as a model. After working with these forms for a while, ask the business man to come and discuss with the class some of the mistakes made on sales slips in his business and how they affect the other departments in his business. The same could be done with cash receipts.	
	Prepare a flow chart for the bulletin board showing how the sales slips, cash register tapes, and credit memos form a part of the business records system.	

Number	Instructional Ideas	Notes
305.02.03	There are a number of small practice sets which concentrate on the payroll functions as they are affected by time cards.	
	Have a time clock installed in the classroom. (Sometimes these can be bought at a fairly reasonable price at a bankruptcy sale.) Each student must clock in and out; each student is paid at an established rate with raises based on attendance, tardiness, and any other factors the instructor may feel valuable for this type of activity. The students on this unit would do the actual payroll work and issue checks every two weeks.	
305.02.04- 305.02.05	Use flash cards to improve the students' abilities to add and subtract mentally--a skill necessary to the accurate keeping of stock records, inventories, and other recordkeeping activities.	
	Plan field trips to local parts houses and automobile agencies and similar firms--most of whom have excellent inventory systems and also represent a variety of ways of performing this type of business recordkeeping function.	
	Obtain copies of bills of lading, requisitions, purchase orders from workbooks or local businesses and design problems around these forms.	

Number	Condition	Performance	Standard
306.01.01	Given a switchboard or call director and typical situations	a. the student will complete 1. incoming-to-extension calls 2. extension-to-outside calls 3. extension-to-extension calls 4. switchboard-to-extension calls 5. switchboard-to-outside calls 6. calls to hold 7. multiple calls b. direct calls to appropriate departments and/or persons 1. open and close board	earning a score of "pass" on at least 90% of a checklist

Number	Instructional Ideas	Notes
306.02.01	Sometimes a switchboard is given to schools by telephone companies. Use the checklist to help accomplish the objective of handling different kinds of calls. Observe a large switchboard installation at the phone company or in another office in the community. Individual visits by the students to small PBX or multiple line installations are worthwhile. Interview a telephone receptionist to find the qualities and skills needed.	

400. CLERK-TYPIST

Competency Modules

401. Spelling
402. Typing
403. Written Communication

Number	Conditions	Performance	Standards
401.01.01	Given orally 100 common business words encompassing the following: - pronunciation - "ie" or "ei" usage - changing "y" to "i" - dropping final "e" before suffix - doubling consonant before suffix - spelling demons - prefixes and suffixes - endings - homonyms - apostrophes - hyphens	the student will type the words	with 80% accuracy, but not more than 1 error within each category
401.01.02	Given 25 misspelled printed words including: - missing syllables - transpositions - misplacements - extra letters	the student will type the words	with 80% accuracy

NOTE: See Common Core 113 for Instructional Ideas.

Number	Condition	Performance	Standard
402.01.01	Given paragraphs of average difficulty (approximately 1.5 syllabic intensity)	the student will touch type for a period of 5 minutes	at a rate of at least 40 gross words per minute with not more than 8 errors
402.01.02	Given live, oral dictation at a typewriter	the student will type a rough draft directly from the spoken word	meeting the following criteria: - copy is double spaced - content of the draft is identical to dictation - typing errors are corrected by cross outs and/or legible handwriting - copy contains no unmarked typographical errors or spelling errors
402.01.03	Given a transcribing machine with which the student is familiar, and dictation on a recorded medium	the student will type a rough draft	meeting the criteria in the previous objective
402.01.04	Given a request for an original and a file copy and an indication that the file copy need not be corrected perfectly	the student will demonstrate his ability to judge which errors must be corrected on the file copy by correcting errors on his typed work	so that the file copy meets the following criteria: - content is identical to the original - errors in names, amounts, key words, and unusual words are neatly corrected - all other corrections on the original appear on the copy as strikeovers or handwritten corrections - entire copy is legible

Number	Condition	Performance	Standard
402.01.05	Given a copy of an incoming letter requesting an immediate answer and a rough draft of the reply containing errors in word usage, punctuation, spelling and capitalization	the student will type a transmittable letter (including carbon copies as requested)	meeting the following criteria: - all necessary parts of business letter are included - acceptable letter style - well balanced placement - undiscernible correction of all errors - all words spelled correctly - proper usage of words, punctuation marks and capitalization - content follows very closely the thought of the rough draft. Minor variations permitted providing original meaning is not changed.
402.01.06	Given a transcribing machine with which the student is familiar, and dictation on a recorded medium	the student will type average length letters (carbon copies if requested) for a period of 30 minutes	with at least two transmittable letters meeting the following criteria: - acceptable letter style - all necessary letter parts included - undiscernible correction of all errors on original and carbon copies - correct spelling, capitalization, punctuation and word division - content of the letters convey the meaning intended

Number	Condition	Performance	Standard
402.01.07	Given a one-page outline in rough draft and minimal instructions as to preferred arrangement	the student will type a transmittable copy (including carbon copies if indicated)	meeting the following criteria: - completion at a rate of 1/5-1/3 of the student's average straight-copy speed - outline format followed - well balanced placement - content of original and carbon copies identical to source material - undiscernible correction of all errors
402.01.08	Given - an edited rough draft of a 2-page manuscript with at least two footnotes per page - instructions for style and binding - access to a style guide	the student will type a final copy	in specified manuscript form, meeting the following criteria: - completion at a rate of 1/3-1/2 of the student's average straight copy speed - undiscernible correction of all errors - all editing notations followed - footnotes according to style guide
402.01.09	Given - typed minutes of a previous meeting as a guide - handwritten or rough draft copy of the current meeting	the student will type a final copy of the current minutes	meeting the following criteria: - completion at a rate 1/3-1/2 of the student's average straight-copy speed - content identical to the handwritten or rough draft copy - form matches that of the previous minutes - undiscernible correction of all errors

Number	Condition	Performance	Standard
402.01.10	Given a handwritten rough draft of tabulated data and minimal instructions on preferred arrangement and style (open, ruled, boxed)	the student will type a transmittable copy of the table	meeting the following criteria: - content identical to source data - form as specified in the instructions - well balanced placement - appropriate spacing between columns - appropriate spacing between vertically separated items (i.e., title, subtitle) - undiscernible correction of all errors
402.01.11	Given a table of seven or more columns of data and instructions to omit some columns, rearrange others, and to use a specified style	the student will type a transmittable copy of the table	meeting the criteria in the preceding objective
402.01.12	Given simple data as it would appear on a computer printout and instructions regarding arrangement and style	the student will type a transmittable table of the data requested	meeting the criteria in objective No. 402.01.10
402.01.13	Given a handwritten rough draft of two financial statements and style samples	the student will prepare a transmittable copy (and carbon copies if requested) of each statement	meeting the following criteria: - content identical to source data - form following sample - undiscernible correction of all errors

Number	Condition	Performance	Standard
402.01.14	Given - a mimeograph stencil - a one-page source document - placement instructions - correction aids	the student will type and make corrections on the stencil	so that copies run from the stencil will meet the following criteria: - accurage in content - placement as specified in instructions - unnoticeable correction of all errors - entire page legible
402.01.15	Given - a paper master for offset printer - a one-page source document - placement instructions - correction aids	the student will type and make corrections on the master	so that copies run from the master will meet the following criteria: - accurate in content - placement as specified in instructions - unnoticeable correction of all errors - entire page legible

Number | Instructional Ideas | Notes

402.02.02 What shall we teach:

A. Quick and quiet removal of paper from typewriter.

B. Quick setup of typewriter for rough draft; such as margins and double spacing.

C. Quick insertion of paper

D. Concentration on what is being said.

E. How to slow down dictator if dictation is too fast.
  1. Ask for words or phrases to be repeated.
  2. Ask for a spelling of a word.
  3. Repeat numbers, names, dates or words to dictator.

F. Relaxed atmosphere and rapport between dictator and typist.

How shall we teach:

A. Time removal and insertion of paper, resetting of margins.

B. Remind students to watch paper - not keys - as they type.

C. Dictate to small groups or to individuals, speaking distinctly in soft tones to develop concentration.

D. Begin by dictating short sentences and increase the length and difficulty of sentence structure.

E. Dictate sentences using sound-alike words; i.e., hear, here; billed, build; weak, week.

F. Make the typist feel at ease. Do not watch the typist's hands or copy. Face the typist if at all possible. Be aware of when the typist stops typing. When using unfamiliar words, spell them.

Number | Instructional Ideas | Notes

402.02.03 How shall we teach:

A. Before attempting this objective, students should type at 40 gross words per minute and have demonstrated competency in Office Core modules 205, Spelling; 206, Typing; and 208, Written Communication.

B. For initial contact with the transcribing machine, refer to the operator's manual.

C. Use filmstrip presentations, student tutor or teacher demonstration.

D. Use teacher-prepared tapes of short interesting articles, poems, current book reviews of interest to student age group. As skill progresses, use longer magazine articles. Highlight or condense articles from business magazines.

E. School personnel will often dictate unclassified correspondence, lecture notes, and student information sheets.

F. If the student has information regarding the nature of the dictation, he will be able to anticipate the vocabulary used and thus produce copy more efficiently. Job sheets should include:
   1. Brief paragraph as to the nature of business or dictation material and identification of person dictating.
   2. Vocabulary preview.
   3. Format to be used.
   4. Special instructions as to notations.
   5. Suggested time schedule and performance objective.
   6. Use colored paper marked "rough draft to be revised," date, and initials for all rough drafts.

G. Student must be encouraged to use reference materials.

H. Observe student's performance to be aware of trouble areas:
   1. Listening to too much at one time.
   2. Constant hesitation.
   3. Improper placement of machine at work station.
   4. Incorrect adjustments of machine.

Number	Instructional Ideas	Notes

402.02.04 What shall we teach:

A. Just as a typist needs to learn when a rough draft is "good enough" and that anything better is inefficient, he should learn that in some offices it is considered inefficient to correct all errors on file carbon copies. The purpose of the file copy is to have a record of the letter - not a perfect copy of the original. No confusion would arise if a strikeover appeared on the copy in the word "copies" (copyes), for example. On the other hand, considerable confusion would result if a strikeover occurred in "$59.95" ($39.83) or in "Mr. Smythe" (Mr. Smyth).

How shall we teach:

A. Introduce the above concept through teacher presentation with the aid of transparencies or, in individual progress instruction, in slide/tape form or in a LAP.

B. Give students many typing tasks where they are instructed to correct only those errors that would confuse a reader if left uncorrected. This skill probably need not be introduced until near the middle of the total typing program.

402.02.05 What shall we teach:

A. Students must learn to make the kind of decisions that employers will expect them to make. If the student always copies from material that contains:
1. reminders to type the date.
2. the appropriate salutation.
3. the necessary spelling, capitalization, punctuation and paragraphing.
4. the appropriate complimentary closing.
5. reminders to type such special notes as "enclosures"
how can he learn to make those decisions on his own?

Number Instructional Ideas Notes

402.02.05 (continued)

B. Typists are often asked to type form letters that require the filling in of appropriate information and the adjustment of such words as him/his, today/tomorrow, is/was/will be, etc. Form letters are often put together from a list of possible paragraphs.

How shall we teach:

A. Duplicate copies of complete handwritten letters that will require students to make these decisions. After students have completed the Written Communication competency modules, they should be asked to type these letters without teacher help - but with help from any reference book.

B. Duplicate a packet of numbered paragraphs. Give oral or written instructions to student indicating the paragraphs needed for each of several letters. Paragraphs should have blank spaces requiring the student to select proper pronoun, date, or other words to make it fit the situation.

402.02.06 What shall we teach:

A. Use of index tabs, log sheets, etc., to determine size of letter or memo and changes.

B. Sound-alike words.

C. Vocabulary related to the types of business represented in the dictation.

Number	Instructional Ideas	Notes

402.02.06 (continued)

How shall we teach:

A. Produce a manual or job sheet for the student to follow including:
  1. Model of letter and memo format (use most common style).
  2. Reminder of standards of a transmittable letter and memo.
  3. Vocabulary words representative of dictation to be transcribed.
  4. Names and addresses of persons to whom letters will be addressed.

B. Make available and encourage use of dictionaries and reference books.

C. Refer to manuals of manufacturing companies for direction of specific index tab, log sheets, etc.
  1. Students should be made aware of flagging of special instructions or corrections. Instruct students to listen to flagged areas before starting to type the letter or memo.

D. Build mailability by directing students to:
  1. Listen to those flagged areas first.
  2. Plan for size of letter.
  3. Listen intently.
  4. Concentrate on meaning of sentences and words.
  5. Correct errors as the student is aware they are made.
  6. Proofread letter before removing from the typewriter by listening to the dictated letter again while comparing the typed copy.

E. Do not demand transmittable letters directly from the recorded media in the beginning stages of the learning process.

F. Compliment students' first-try transmittable letters but do not degrade those not transmittable. Discuss the types of errors made and then have students transcribe the letter again. Mailability will grow with familiarity.

G. Local businessmen may be willing to provide realistic material by taping representative dictation of their daily correspondence.

402.02.07 What shall we teach:

A. Outlining can be done in several styles:

Example 1	Example 2
I. XXXXXX	1.0.0 XXXXXX
A. Xxxxxxx	1.1.0 XXXXXX
B. Xxxxxxx	1.2.0 Xxxxxx
1. Xxxxx	1.2.1 Xxxxx
2. Xxxxx	1.2.2 Xxxxx
II. XXXXXX	2.0.0 XXXXXX

Manuscripts or reports are often arranged in outline form with major and minor headings preceded by numbers and letters so that the organization of the paper is immediately clear.

How shall we teach:

A. If the commercially prepared materials you use do not contain enough examples of outlines, duplicate some. Find outlines in school district reports or even old outlines prepared for some term papers that can be adapted quickly to fit the needs of your students.

B. Major stress should be given to consistency of arrangement -- step indenting, spacing between lines. An outline quickly loses its attractiveness and readability if these details are ignored.

Number | Instructional Ideas | Notes

402.02.08 What shall we teach:

A. Students will not always work with rough drafts from books; therefore, teach concept of typing a rough draft and possibly a second rough draft before final copy. Stress the need to type a final copy in time allotted.

How shall we teach:

A. Teach the concept of typing a rough draft for a manuscript and planning for footnotes by:
   1. Typing footnote in the body of the manuscript immediately after the superior number. Type the dividing line one line below the superior number. Drop two lines and start the footnote; then drop one line and type another dividing line. Drop two lines and start typing again. This is an aid in producing an acceptable bottom margin.
   2. When typing the final copy, place footnote at bottom of page.

B. Give additional drill on individual parts of the manuscript, timing these drills.

C. Assign a multi-page manuscript with 2 carbons, requiring a rough draft and a final copy.
   1. Pair students:
      a. One student begins typing a rough draft from the beginning.
      b. Second student begins a rough draft at approximately the middle of the manuscript.
   2. Cut and paste the two rough drafts together into a dummy copy.
   3. Students edit dummy rough draft together.
   4. Both students type pages of final copy being certain type matches and pages fit together without spaces and lost words.

Number | Instructional Ideas | Notes

402.02.09 What shall we teach:

A. There are many very specialized formats for business reports. Minutes of meetings provide a good practice vehicle for working with specialized formats.

How shall we teach:

A. Collect minutes from local service organizations, student body groups, or business and labor organizations; prepare transparencies and/or bulletin board displays to illustrate the variety of forms minutes may take.

B. Reference manuals and secretarial handbooks are also a good source of format.

C. The objective specifies that the student should be provided with a sample copy of the format he is to follow whenever he is asked to type minutes because few typists would be expected to remember the complex format of a report he may type only once a month. In fact, not using a sample would be a serious error of judgment.

402.02.10
402.02.11
402.02.12 What shall we teach:

A. Most table typing is from source material that falls into one of the three following categories: a handwritten rough draft, selecting data from another table, and working from computer printouts. Students must not be held to copying from carefully prearranged material as difficult as even that may be for some beginning typists.

B. Almanacs, statistical abstracts, government reports all provide a good supply of material for tables. Some will be too complex; select data to make the kind of table needed at any point in the instruction process. Advanced students ought to struggle with complex tables, including those that need to be typed sideways.

Number **Instructional Ideas** **Notes**

402.02.10 (continued)
402.02.11
402.02.12

C. Use transparencies, LAPs, slide and/or tapes to present step-by-step instructions for each new table placement concept.

D. Students should have immediate access to a correctly arranged copy with which to compare their own work.

E. Be reasonable in evaluating work of students. If you cannot determine whether a column heading, for example, is centered without using a ruler, do not consider it an error.

402.02.13 What shall we teach:

A. The accountant pencils in the current balance sheet figures on a copy of last month's statement or prepares a columnar accounting form. In the latter instance the form often has 12 or more amount columns plus a description space; the account titles are written in the description space and each month's balance sheet items appear in an amount column. The typist is asked to work from that sheet each month.

B. Be sure students get practice placing complex financial statements sideways on standard paper. It would be nice (but not necessary) for students to get a little practice with copy that is so wide that two pieces of paper are needed.

How shall we teach:

A. Introduce "leader lines" soon after students begin work on financial statements. A carefully planned section of a LAP or a slide/tape unit would help students through this confusing task.

B. You may be able to integrate advanced statement typing into other phases of the program. If there is a student store, for example, perhaps the job of typing statements can be undertaken by advanced students.

Number | Instructional Ideas | Notes

402.02.14 What shall we teach:

A. Advantages and disadvantages of the mimeograph process.

B. Kinds of stencils. (If possible, show examples and explain thermal stencils and electronic stencils in addition to special purpose stencils such as those designed for newspapers, programs, address labels, etc.)

C. Cushion sheet.

D. Margins within which typing must be confined.

E. Ribbon position.

F. Corrections.

G. Use of cement for patching and to permit horizontal typing on stencil.

H. Drawing lines, use of lettering guides, and simple artwork.

I. Proofreading:
   1. by typist while in typewriter.
   2. two persons proofreading with someone other than typist reading stencil (especially necessary for important documents and/or stencils from which a large number of copies will be run).

How shall we teach:

A. Teacher explanation and demonstration is effective if well planned and complete, but in learning centers with a variety of activities additional teaching media are needed to provide ways for students to learn independently. Suggestions include programmed instruction and slides or filmstrip with record or tape. These materials can be commercially prepared or teacher-prepared.

Number | Instructional Ideas | Notes

402.02.15 What shall we teach:

A. Advantages of offset process.

B. Kinds of masters.

C. Guidelines on masters.

D. Typewriter adjustments (ribbon, type, pressure, etc.).

E. Correction techniques.

F. Drawing on master.

G. Storage of masters.

How shall we teach:

A. Real projects for use in the instructional program, school administration, or by student organizations on campus are more valuable than projects created strictly for sample experiences. Real projects increase student motivation and sense of responsibility. They also affect student attitudes toward the quality of the work produced. If typing service is performed within a model office or student production room setting, it can also serve as a means of providing student experiences in work scheduling, establishment of priorities, and working with people requesting the services performed.

Number	Condition	Performance	Standard
403.01.01	Given an incoming piece of correspondence requiring a written response	the student will compose and type a response	meeting the following criteria: - content conveys message intended - generally accepted letter or memo style used - placement on the page is well-balanced - errors corrected - body of letter is free of major error in: word usage spelling capitalization punctuation paragraphing

Number **Instructional Ideas** **Notes**

403.02.01 What shall we teach:

A. The clerk-typist will benefit from composition practice directed toward letter and memo writing.

B. Typists ought not be expected to compose free of major errors in word usage, spelling, capitalization, punctuation, and paragraphing until after they have had the opportunity to complete the communications and spelling modules.

How shall we teach:

A. Many letters in letter production problems require an answer. Students can practice composing answers to those letters.

B. Duplicate brief descriptions of situations that require a letter or memo. A request for motel accommodations, a simple merchandise order, an acceptance of an invitation to a banquet, or a brief memo to an employee informing him that his salary is being increased--all of these are examples of possible situations.

C. You may want to have students work in pairs and compose letters. By working together, they will be able to help each other choose the best thoughts, sentence structure, and words.

D. Build letter composition into a simulated office setting near the end of the student's program.

E. Have students dictate letters on recorded mediums, using an outline.

500. STENOGRAPHER

Competency Modules

501. Spelling
502. Typing and Transcribing
503. Written Communication

STENOGRAPHER

The stenographer job encompasses the skills of the other selected jobs, plus higher standards in spelling, typing and transcribing, and written communication. Because the stenographer must be competent in all General Office Clerk skills and the majority of Clerk-Typist skills, only those competencies requisite for stenographer only are included in this section.

The Task Force concurred that shorthand theory and dictation training would take place concurrently with other competencies but in a separate setting; therefore, the entry-level shorthand competence is expressed as a transcription objective. The rationale is that the quality of the transcript measures one's stenographic competence. The student would also use his English background in performance of the transcribing skill. The teacher would need to plan the student's study program with this goal in mind, recognizing the time required by most students to do this. A student aspiring to stenographer competence certainly would need to develop shorthand skill along with his general office and typing competencies.

Number	Conditions	Performance	Standards
501.01.01	Given orally 100 business words encompassing the following: - pronunciation - "ie" or "ei" usage - changing "y" to "i" - dropping final "e" before suffix - doubling consonant before suffix - spelling demons - prefixes and suffixes - endings - homonyms - apostrophes - hyphens	the student will type the words	with 90% accuracy but not more than 1 error within each category
501.01.02	Given 25 sets of 4 words	the student will identify the incorrectly spelled words and type them correctly	with 90% accuracy

NOTE: See Common Core 113 for Instructional Ideas.

Number	Condition	Performance	Standard
502.01.01	Given paragraphs of average difficulty (approximately 1.5 syllabic intensity)	the student will touch type for a period of 5 minutes	at a rate of at least 50 gross words per minute with no more than 8 errors
502.01.02	Given a transcribing machine with which the student is familiar and dictation containing common business vocabulary on a recorded medium	the student will type average-length letters, with carbon copies as requested, and corresponding envelopes, for a period of 30 minutes	with at least 3 transmittable letters meeting the following criteria: - acceptable letter style - all necessary letter parts included - undiscernible correction of all errors on the original and carbon copies - correct spelling, capitalization, punctuation, paragraphing, and word division - content of the letter conveys the meaning intended
502.01.03	Given dictation containing common business vocabulary at the rate of 80 wpm for a period of 3 minutes	the student will type a transmittable letter from his notes, with carbon copy, and a corresponding envelope	at the minimum rate of 20 wpm meeting the following criteria: - acceptable letter style - all necessary letter parts included - correct spelling, capitalization, punctuation, paragraphing, word division, and proper word usage - undiscernible correction of all errors - content of letter conveys the meaning intended

Number	Condition	Performance	Standard
502.01.04	Given office-style dictation	the student will, having recorded the dictation, type a rough draft	meeting the following criteria: - content conveys the meaning intended - dictator's instructions followed - copy contains no unmarked errors in spelling, capitalization, punctuation, paragraphing, word division, or word usage

Number	Instructional Ideas	Notes

502.02.02 What shall we teach:

A. Stress mailability on first typing.

B. Stress speed.

C. Review paragraphing.

How shall we teach:

A. Students should have reached the standard for Clerk-Typist.

B. Use manual or job sheets which include:
   1. model of letter and memo format (use a new style occasionally--concentration should be placed on at least 2 and no more than 3 of the most common letter styles)
   2. special letter parts and placement
   3. instructions of adjustment of parts for attractive placement
   4. if vocabulary is new, review of vocabulary may still be necessary

C. Students should work on a timed basis at least once a week. It may be advisable for the student to keep a running check on the amount of time needed to transcribe 2 or 3 letters each day. Students are then constantly advised of their progress.

D. Build confidence in mailable copy on first attempt by using easy, short letters. If letters are mailable, sign and return. If not, return for possible correction or retyping.

502.02.03 Type rough drafts from shorthand notes

A. Preshorthand activities

Assess the typing and written communication ability of the student. The beginning stenographer student should have control of keyboard and a typing rate that is faster than his handwriting. The student will need competency in spelling, punctuation, and grammar. An overview of phonics may provide useful background for writing symbols from sounds.

Number

Instructional Ideas

Notes

502.02.03 (continued)

B. Instruction may be:
  1. traditional class with or without listening stations
  2. individualized instruction
  3. programmed instruction
  4. any combination of the above

C. Early approaches can include:
  1. reading concentration for the first few weeks
  2. writing outlines constructed after the rules have been learned
  3. early new-matter dictation, encompassing tracing, automation of brief forms, listening to "earfuls," continuous dictation by 2nd week, and 3-minute takes for transcription by 4th week
  4. micromolar approach for fast response dictation from beginning

D. For students needing special help:
  1. discuss the basic sounds of the shorthand letters
  2. ask them to spell the word in shorthand, give the sounds of the spelling, and then say the word
  3. develop a shorthand phonics chart to help students understand the sounds of the letters
  4. use work sheets of new sounds and write sentences using the new sounds
  5. observe students for extraordinarily slow response, eye difficulty, writing instrument usage
  6. obtain individual reading rates from printed copy
  7. prepare students for listening, total awareness of words, and punctuation
  8. introduce reference books to be used by students, explain when and how to use them, and encourage use

E. For rapid reading:
  1. Play "Beat the Clock" by giving students a time limit for a specific number of words. This can be done on an individual basis or a team basis.

Number Instructional Ideas Notes

502.02.03 (continued)

E. (continued)

2. Pair students with one listening while one reads. Listener prompts immediately. Have the entire group read aloud as fast as each individual can read. This is noisy, but motivating.
3. Pacing students reading and transcribing pushes development of twpm.

F. For writing techniques:

1. Use overhead projector when giving group instruction. Student can observe the proper use of pen, fingers, and hand. Write words quickly, repeating words rather than writing slowly. Use continuous roll rather than stopping to erase or wipe off. Use the roll for preview next day.
2. Demonstrate for students on individual basis whenever possible. Sit down with an individual or a group of students around a table or in a desk grouping. Ask student to dictate to you and demonstrate writing posture, turning of pages, holding of pen, keeping pen and hands close to notebook at all times.
3. Use transparencies, writing over the presented material. Issue a clear transparency to each student. Student covers words in book and then traces as teacher dictates. Student can also use tracing paper or a knitting needle on the text.

G. For automation of brief forms and high frequency words:

1. Use flash cards. May be used individually, in groups of 2 or large group. Instructor should time students on flash card. Can also be used for transcribing at the typewriter. Teacher flashes cards while student transcribes. Using a typewriter allows student's eyes to stay on area of flash cards rather than looking down to write longhand.

Number **Instructional Ideas** **Notes**

502.02.03 (continued)

G. (continued)

2. 4-fold method (Fold 8½ x 11" paper from bottom to top 3 times). Write brief forms down first column, copying from book as teacher or tape dictates slowly. Transcribe in second column. Fold under first column. Write shorthand from longhand transcription, checking first column when necessary. Continue process until all eight columns are filled. This activity may be used as an in-class activity or as part of a homework assignment. It is good for individualized instruction. As students become proficient in previously learned brief forms, time each column to increase writing speed.

H. Preview words strategy:

1. If students are working with tapes or on an individualized basis, preview words by using duplicated preview sheets. Make these preview sheets available in a file or a permanent folder. These preview sheets will last longer if laminated.
2. If presenting preview to a group, use 3x5" cards. Identify card by dictation source. Cards may be reused each year. Trouble areas may be noted on cards and new words added.

I. Dictation patterns may include:

1. one-minute plan (easiest to use and best for beginning students)
2. 3 x 4 plan (best for advanced shorthand)
3. inverted pyramid plan (builds accuracy as well as speed)
4. progressive plan (useful before dictating speed takes for transcription)
5. reverse plan
6. office style

Name **Instructional Ideas** **Notes**

502.02.03 (continued)

J. What shall we teach for transcribing:
   1. dating notebook and pages
   2. flipping of pages to avoid loss of time and noise
   3. leaving of space between each piece of dictation for special instructions
   4. flagging rush items
   5. flagging enclosure notations in dictation
   6. how to handle interruptions
   7. organization of work station
   8. presenting finished transcripts for dictator's signature
   9. collecting and presenting enclosures

K. How shall we teach work organization:
   1. Use two notebooks--one for homework, one for dictation or classroom work. Advise students to date notebooks using red pen or pencil.
   2. If secretarial desks are not available in the classroom, use a set of folders to arrange stationery. Use letterheads as much as possible. Local businesses which change officers, addresses, telephone numbers, and such will often be glad to donate obsolete letterhead. Students will also collect stationery from parents' offices or printers may supply seconds.
   3. Use manila folders for submitting student's transmittable letters to instructor.
      a. Ask for an original, 2 copies, and an envelope of each letter transcribed.
      b. Upon receipt of folder, teacher will read for mailability, and if mailable:
         (1) sign original
         (2) return original, one carbon, and envelope
         (3) retain and file second carbon in student's file
         or if not mailable:
         (4) indicate corrections on one carbon
         (5) return entire package to student

Number Instructional Ideas Notes

502.02.03 (continued)

K. (continued)

3. (continued)

c. Upon return of folder, the student will, if mailable:

(1) fold original and insert or staple to envelope facsimile accordingly

(2) place in "Outgoing Mail" to be mailed

(3) file carbon in her chronological file

or if not mailable:

(4) correct errors as indicated without retyping, if at all possible

(5) return entire pack to teacher in day's transcription folder

(6) retype, if necessary

(7) return 2nd typed pack and edited carbon copy of 1st typing

4. Give special transcribing instructions occasionally by asking for a new letter style, a rough draft of a letter rather than transmittable, additional carbons, and a rush letter.

502.02.04 Dictation ideas:

A. Early new-matter dictation increases interest. Start after the second group of brief forms has been presented.

B. Make your own tapes. Ask teachers in your department to make tapes to help students adjust to new voices. Include men's and women's voices as well as different accents.

C. Office-style dictation can be used occasionally with beginning students just to give them the feel of control. Allow a student to interrupt or slow down the dictation as is necessary for him to record dictation. Do not always choose the best student. In office-style dictation, teach slowing down techniques; i. e.,

1. raising left hand slightly
2. ask for spelling of words

Number Instructional Ideas Notes

502.02.04 (continued)

C. (continued)
   3. raising nonwriting hand slightly
   4. asking for a repeat of last words
   5. asking for spelling of names, dates, numbers, unfamiliar words
   6. even a cough will slow down the dictator

D. Dictate short articles for rough draft practice. Be certain dictation is well within student's speed range.

Transcription ideas:

A. Begin early!

B. Build confidence in student early in transcription by reading and rereading material to be transcribed. Discuss any problem areas. Help students that seem to have difficulty when transcribing their notes. Encourage students to fill in their shorthand if they missed part of the dictation either from memory or for the reading activity.

C. Begin transcription with rough draft format. Review typing of a rough draft. When checking transcript, do not call attention to typing errors; simply use editing marks.

D. Encourage rapid transcription, x'ing out errors as student is aware of them and immediately retyping the correction.

E. Time students on transcription. Use short 1-minute writes. Repeat to increase speed and then indicate a new starting point in the notes and continue the timings.

Number	Condition	Performance	Standard
503.01.01	Given 20 sets of similar-sounding words and a list of definitions	the student will identify the correct definition for each word	with 90% accuracy
503.01.02	Given a paragraph of business material containing: - mistakes in word usage - unnecessary repetitions - and access to a reference manual	the student will edit the paragraph	with correct word usage and repetition eliminated by selection of suitable substitutes
503.01.03	Given an unedited business letter	the student will rewrite and type the letter	so that the corrected letter is: - clear - concise - correct - courteous - complete
503.01.04	Given one page of an unedited business report and access to a reference manual and dictionary	the student will locate and correct errors in: a. spelling b. punctuation c. grammar d. capitalization e. number presentations (figures or words)	accurately

NOTE: See Common Core 116 for Instructional Ideas.

800. DISTRIBUTIVE CORE

Competency Modules

Orientation

801. Careers in Marketing
802. Marketing in Our Economy

Competencies

803. Basic Sales Techniques
804. Cashiering (Cash Register and Sales Records)
805. Communication
806. Customer Services
807. Employer-Employee-Customer Relations
808. Sales Promotion
809. Stockkeeping and Inventory Control

Specialties

810 Advertising
811 Creative Selling
812 Display

DISTRIBUTIVE CORE

This section includes those competencies common to entry-level employment in four of the areas in which high school distributive education students most frequently find employment; namely, U.S.O.E. classifications: Food Distribution, General Merchandise, Petroleum, and Food Services.

As noted in the introduction, two major studies (Crawford and Ertel) were used as the bases to determine which tasks are performed by entry-level employees in distributive jobs. For those competencies needed by employees in the four distributive areas named, performance objectives have been designed so that a student's ability to use his knowledge effectively in execution of a distributive job can be measured by standards that are compatible with those found in distributive employment.

Four entry-level jobs were selected from the areas named: Checker-Cashier; Salesperson, General; Service Station Attendant; and Waiter-Waitress. These representative jobs were chosen because of their basic entry-level appeal to many distributive education students. Upon completion of the Common Core competencies, the Distributive Core competencies, and competencies for one distributive occupation, a student would be prepared for entry-level employment in distribution. Because of the interrelationship among other jobs in distribution and for potential promotion, some students may wish to become competent in the Distributive Core specialties also.

Instructional ideas related to each performance objective are in no way inclusive; they have, however, all been used successfully in a distributive program in California. They have been screened for a direct relationship to the objective. Some of the specific product or service technologies cut across vocational areas, such as the service station and waiter-waitress jobs. In many schools, these competencies are being taught in conjunction with teachers from other vocational areas including technical-industrial and home economics personnel. This pattern may be a necessary one for many occupational areas in the distributive education field; when that is so, it is essential that it be implemented as it will prove beneficial to the training program and to the individual student.

Number	Condition	Performance	Standard
801.01.01	Given an interest test	the student will complete the test and select the three occupational areas in which he is the most interested	to the teacher's satisfaction
801.01.02	Given California Occupational Guides, job information sources, and the criteria for analyzing a career: - educational requirements - conditions of employment - salary - jobs leading up to and following - occupational outlook - correlation with life style	the student will: a. select a career from one of the occupational areas from 801.01.01 b. prepare and give an oral report covering the six criteria for analyzing a career	to the teacher's satisfaction to the teacher's satisfaction and scoring at least 50% on the Rating of Oral Communication form (Competency 805)
801.01.03	Given the student's reports on careers, the student's interest test results, and Occupational Guides, Occupational Outlook, and DOT's	the student will select an entry-level job in the distributive field and write a report listing the requirements for the entry-level job	including the criteria listed in 801.01.02, to the teacher's satisfaction
801.01.04	Given the results of an achievement test or California Aptitude Test profile (from the counselor) and/or the student's grades from 9th to current grade, the list of competencies needed for his career goal and the entry-level job	the student will compare his present competencies with those needed for his entry-level job and career goals and list competencies which he will need to develop	completing the comparison and having a student/teacher conference

Number	Instructional Ideas	Notes
801.02.01	If the student has had a recent interest test, he can use that profile. If this test is given at the beginning of the program, students can be counseled to find either an area of interest or an alternate program.	
801.02.02	Career Centers in schools may be one source of career information. If students seem to be having difficulty composing an oral report, the teacher may dictate an example to be sure that all needed information is included and that it is presented in the sequence desired.	
	Oral reports by students give the teacher an opportunity to help students with speech techniques, poise and self-confidence. (Use the form from Communication, Competency 805, for rating this and other oral reports.)	
801.02.03	During this unit local business people should be invited to talk with the students about career opportunities in their fields. Oil companies, franchise offices, large retail stores and your civic organizations offer many valuable people who can explain the wide range of careers in their areas.	
801.02.04	Once each student's career choice, entry-level job choice, and competencies (present and needed) have been charted, the teacher will need to review each one carefully, remembering that tests can be wrong. Counsel with each student on the appropriateness of his choice and the competencies he will need before being ready for the entry-level job and his career goal. The teacher should be cautioned that students tend to compare their skills with peers rather than job standards.	

Number	Condition	Performance	Standard
802.01.01	Given information on the causes of price changes and the "What Influences Price Changes" chart	the student will list 8 products and check the reasons for their price changes	with at least 5 products correctly checked
802.01.02	Given the Economic/Market Trends chart	the student will match the economic trends with marketing trends	with at least 10 out of 13 correct
802.01.03	Given the Case Problem on Profit	the student will write an essay outlining the natural consequences of the situation	to the teacher's satisfaction
802.01.04	Given a list of 10 consumer goods, a list of a variety of commonly used channels of distribution, and the Channels of Distribution chart	the student will match the usual channel of distribution for each type of goods	with 80% accuracy
802.01.05	Given the Price/Weight Comparison chart	the student will locate and list price and weight information for one nationally advertised brand, one store brand, and one off-brand of the same product, and: a. compute prices per ounce b. note differences and draw conclusions for the price differences	with 100% accuracy to meet criteria developed by the teacher
802.01.06	Given the Business Organizations chart	the student will complete the type of preferred organization for each case study	with 5 out of 6 correct
802.01.07	Given a customer who has a need for which there is no product presently available	the student will schematically diagram the procedures by which the marketing system would satisfy that customer's needs	to the teacher's satisfaction

Number	Instructional Ideas	Notes
802.02.01	Have students bring in newspaper, magazine articles, or items seen on TV depicting some recent national changes. Discuss how these will affect human behavior, prices, supply and demand in our economy.	
802.02.02	Have the students apply the economic trends and the market trends used in 802.01.02 to something that has occurred in their family or close friend's life in the last year. Have each student select one of the marketing trends, and take them to the library so they can research the trend for one class period. The next day have the students give an oral report of 1-3 minutes to the class (use the Rating for Oral Communications form from Competency 805).	
802.02.03	This case problem is designed to show the role profit plays in our economy. A good lead-in could be the NADET (National Association of Distributive Education Teachers) transparencies on the "Role of Profit."	
802.02.04	Invite a sales representative or a store buyer from a large company and a small business owner in the area to introduce the channels of distribution their company uses. Local people and companies often relate the process very realistically to students.	
802.02.07	Divide the students into groups and give each group a marketing function and have students do research on their assigned area. Select a student to be a customer with a need, for which no product exists, and have the students trace the steps and procedures verbally using the marketing functions by which the marketing system would attempt to satisfy this customer.	

WHAT INFLUENCES PRICE CHANGES

Instructions: Place a check under each economic factor contributing to a price change for each product listed.

List of Products	Increase of Demand	Decrease of Demand	Cost of Labor	Cost of Capital	Decrease of Supply	Increase of Supply	Cost of Materials	Cost of Doing Bus. (Ins., Tax)	Cost of Research & Develop.	Change of Style
1.										
2.										
3.										
4.										
5.										
6.										
7.										
8.										

ECONOMIC/MARKET TRENDS

Instructions: Match the Economic Trends with the Market Trends.

ECONOMIC TRENDS

1. Growth of population
2. Movement of population to suburbs
3. Two-income families
4. Increase in disposable income
5. Increase in cost of doing business, including labor cost
6. Shorter work week

MARKET TRENDS

____ Increase in credit cards.
____ Scrambled merchandising.
____ Business mergers.
____ Growth in discount stores.
____ Lengthening of store hours.
____ Increase in gross national products.
____ Growth of luxury purchases.
____ Self-service.
____ Increase in recreation purchases.
____ Increase in service industry.
____ Shopping centers.
____ Failure of small businesses.
____ Increase in family shopping.

CASE PROBLEM ON PROFIT

The President is proposing a revision in the tax laws and one proposal is that all company profits from all businesses go directly to the government. You are an analyst for the government and you have been asked to write a brief paper on what possible consequences might arise for large businesses, small businesses, the consumer, and the investor.

CHANNELS OF DISTRIBUTION

Instructions: Place a check in each square that represents a step in the channel of distribution for each product and incicate whether that channel is direct or indirect.

Product	Producer	Agent	Wholesaler	Retailer	Consumer	Is this direct or indirect marketing?
1. Panasonic radio						
2. Peaches sold by a farmer through a roadside stand						
3. Jantzen swimwear						
4. Peaches sold to a canner to be retailed on the east coast.						
5. Westinghouse TV						
6. Binder paper						
7. Peaches sold to a canner to be retailed in California						
8. Curity baby clothes						
9. Ford Mustang						
10. Florsheim or Gallenkamp shoes						

PRICE/WEIGHT COMPARISON CHART

Date:____________ Name:____________________ Name of Store Visited:____________

Comparison Shopping Data

Item #1: Brand Name:____________________
Small size: Weight________ Price________ Price/unit________
Large size: Weight________ Price________ Price/unit________

Item #2: Brand Name:____________________
Small size: Weight________ Price________ Price/unit________
Large size: Weight________ Price________ Price/unit________

Item #3: Brand Name:____________________
Small size: Weight________ Price________ Price/unit________
Large size: Weight________ Price________ Price/unit________

Differences Noted

List here any differences you find in prices among the three brands:

Item #1 and Item #2:____________________
Item #1 and Item #3:____________________
Item #2 and Item #3:____________________

Conclusions

Can you draw any conclusions from the differences you found? Please write whatever conclusions you have drawn.

____

____

____

Business Organizations

Instructions: List which type of business organization would be applicable for each situation and why you think so. If there is more than one possible type of organization, you are expected to list both with appropriate reasons.

EXAMPLES	TYPE OF ORGANIZATION	EXPLANATION
1. A group of citrus farmers is considering selling its merchandise together.		
2. A lady is considering opening a wig shop in her home.		
3. Two gentlemen are interested in setting up a miniature golf course.		
4. Ray Vallejo approaches Sambo's for a franchise in Gem City, California.		
5. A new shopping center is being built and Mr. Engleberg Jones will open a pet shop.		
6. Three brothers have a chance to purchase a large department store but are short of money.		

Number	Condition	Performance	Standard
803.01.01	Given a simulated sales situation or case problem and the four basic sales approaches: - personal greeting - service - merchandise - acknowledgement	the student will demonstrate or give in writing (conversation form) the use of each	correctly
803.01.02	Given information on buying motives and a list of 20 products	the student will match the customer's buying motives with the products	matching 16 accurately
803.01.03	Given the principles of substitution selling for: - brand substitution - product substitution - quality substitution	the student will write a sales conversation for each type of substitution selling	correctly
803.01.04	Given brochures, merchandise tags and labels that provide information about a product	the student will prepare a list of ten product features	listing at least eight features correctly
803.01.05	Given the list from 803.01.04, an identified customer and the "Product Analysis Sheet"	the student will write how to: a. relate product or service features to customer needs b. convert product or service features into customer benefits	completing the form with at least 15 correct
803.01.06	Given the principles of customer involvement and the product list from 803.01.04	the student will list ways of involving his customer in an effective demonstration	using at least 3 principles

Number	Condition	Performance	Standard
803.01.07	Given a simulated sales situation and the following methods used by the salesperson to overcome objections: - "Yes,...but" - explanation - demonstration	the student will either write (conversation form) or demonstrate how he would overcome each of the following common objections: a. price b. quality c. timeliness d. need e. selling firm	with 4 of the 5 objections adequately overcome
803.01.08	Given a simulated sales situation, the principles on closing a sale, and the following list of closing techniques: - choice close - assumption close - impending close - standing room only close - premium close	the student will either write (conversation form) or demonstrate the use of each closing technique	with 4 of the 5 closes used correctly
803.01.09	Given a simulated sales situation and the following principles for making effective suggestions leading to additional sales: - satisfy the customer's request first - make suggestions from the customer's point of view - make the suggestion specific - make the suggestion positive - show the suggested item	the student will either write (conversation form) or demonstrate an example of each of the following types of suggestion selling: a. related merchandise b. unrelated merchandise c. specially priced or advertised merchandise d. new merchandise e. special occasion merchandise	with 4 of the 5 suggestions used correctly

Number	Condition	Performance	Standard
803.01.10	Given a simulated sales situation and the following methods of assuring customer satisfaction: - enjoy use of it - right choice - good value - warranty-guarantee	the student will either write (conversation form) or demonstrate an example of each method of assuring the customer he has made the right purchase	with 3 of the 4 methods used correctly
803.01.11	Given a sales situation (5 minute minimum), the "Basic Sales Rating Sheet," the "Customer Rating Sheet," sales slips, cash register, change, and packaging materials	the student will sell merchandise of his selection to the customer	achieving at least a 70% rating as determined by his peers and/or teacher

Number | Instructional Ideas | Notes

803.02.01 In many of the following objectives, the teacher is given the choice of having the student either demonstrate in person (role play) and/or write out his performance of the activity. This is to provide the teacher with as much latitude in teaching as possible, since having each member of the class demonstrate each objective is time consuming.

One method of using the "demonstrate or write" performance is to divide the class into groups and have one student from each group demonstrate that sales situation while others in the group write out their responses. Using this grouping of students, the demonstrations on other objectives can be rotated among the other members of each group giving everyone the opportunity to do a demonstration for evaluation.

For practice, describe a sales situation for a student salesman and a student customer who will then role play. Other group members should be informed of the sales situation for increased learning, added interest and more fun.

Videotaping the sales demonstration, when possible, is highly recommended. The tapes can be replayed at various times to illustrate everything from diction to customer involvement.

803.02.02 Group discussion of sales demonstrations, when done in detail, gives all students a better understanding of what is expected, and gives the student salesman an opportunity to discuss his ideas about the customer's buying motives with the student customer and group members.

803.02.03 Students should be cautioned that if a customer refuses their substitution, the student should be as helpful as possible in suggesting other stores that might carry the merchandise.

Number Instructional Ideas Notes

803.02.04 Encourage students to bring merchandise to the group so that product features can be identified and customer benefits discussed.

Discussion should include the importance of knowing the exact location of the product in the department and where departments and most merchandise in the store are located.

803.02.05 The students can be given a completed product analysis on a simple object like a screwdriver or pencil and be shown how to relate it to the customer's needs.

803.02.06 The teacher may wish to provide the students with the following rules for a successful demonstration:

a. plan and rehearse the demonstration
b. base the demonstration on prospect benefits
c. let the prospect participate
d. demonstrate the obvious feature first
e. make the picture clear and dramatic
f. get commitments from the prospect
g. always be ready to close

The teacher can divide the class into small groups and have them brainstorm ways to get the customer involved in the sales demonstration. Bring the groups together and compile a complete list for the student to use in his exercise.

803.02.07 Most textbooks have an example of an Objections Analysis Worksheet which may be given to the students to develop skill in overcoming objections.

The teacher may give the students the following list of rules for overcoming objections:

a. listen carefully to the objection
b. look for the real problem
c. show that you understand the objection
d. answer briefly
e. get a commitment from the prospect
f. know when to back off

Number Instructional Ideas Notes

803.02.09 The close is usually the weakest part of a student sales presentation. They should be encouraged to practice each type on a number of different products in either a small or large group.

802.03.10 Too many students, after they have gotten the customer to buy, forget about the customer while writing sales slips and wrapping merchandise. This is the best time to assure the customer that he has made a wise choice, and/or reinforce service or warranty information.

803.02.11 Have each student select a product of sufficient value for a 5-minute sales presentation. By preparing a short written report or outline on the merchandise he will be selling, the student salesman will be more knowledgeable about the merchandise, which will give him greater confidence in his ability to sell.

The written report or outline should include: selling features and customer benefits of the merchandise, customer buying motives, approaches, customer needs, visual aids and demonstration devices, objections, closings and suggestion selling.

The student can obtain the merchandise from home or by making contact with a retail store and arranging to borrow the merchandise to bring to class. The teacher can prepare a short letter identifying the student and explaining the project to the businessman.

The student customer is extremely important in the sales presentation, so a Customer Rating Sheet is included. His instructions should include:
a. he must have a need for the merchandise
b. he must be able to present numerous objections
c. there is a minimum time limit before he can agree to buy the merchandise

To break up the monotony of the sales demonstrations, different situations can be created such as:

Number | Instructional Ideas | Notes

803.02.11 (continued)

a. have a second customer enter the sales demonstration and be looking around
b. have a husband and wife team play the part of the customer
c. have a second customer enter the sales demonstration and attempt to run down the merchandise
d. have a husband and wife team with one of them not wanting to buy the merchandise
e. have a husband and wife team who get into a family argument

General:

A. Have each student go through his pockets or her purse and select one item to sell. The teacher should give an example of an impromptu sales demonstration and then ask each student to give an impromptu sales demonstration on the sales item selected. This may be used for any or all of the steps in the sale.

B. Rating forms are often more effective if co-developed by students and the teacher before using them. The DECA Sales Demonstration rating form can be a guide.

C. Student operation of a school student store provides one of the most realistic and valuable experiences possible for beginning students.

D. Many direct-sales company representatives will demonstrate their products for the class. These sales people should be screened prior to demonstration. This exposure to professional sales presentations can help students develop and evaluate their own sales demonstrations.

PRODUCT ANALYSIS SHEET

Product________________________

Instructions: For each customer need provided by the teacher, provide the product or service feature and the customer benefit.

Product or Service Feature	Customer Need	Customer Benefits
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

BASIC SALES RATING SHEET

Sales Person_________________________ Rater_________________________

Prospect_________________________ Product or Service_________________________

Directions to rater: Check squares that best describe the salesman's performance.

EXPLAIN

1. Type of approach used by sales person

___/ 0 None	___/ 5 Greeting or Service	___/ 10 Personal greeting or merchandise	

2. Did he find out what the prospect wanted?

___/ 0 No	___/ 3 Tried and failed	___/ 5 No need to do so	___/ 8 Yes, satisfactorily	___/ 10 Yes, outstandingly	

3. Did he link product information to the prospect's wants?

___/ 0 No	___/ 5 No need to do so	___/ 10 Yes, outstandingly	

4. Did he use selling points?

___/ 0 No	___/ 3 Weak selling points	___/ 5 No selling pts. needed	___/ 8 Yes, satisfactorily	___/ 10 Yes, outstandingly	

5. Did he use demonstration, comparisons, testimonials, explanations, and such?

___/ 0 No	___/ 3 Tried; was ineffective	___/ 5 No need for them	___/ 8 Yes, reasonably well	___/ 10 Yes, outstandingly	

6. Did he meet the prospect's objections?

___/ 0 No	___/ 3 Unconvincingly	___/ 5 No objections raised	___/ 8 Satisfactorily	___/ 10 Convincingly	

7. Were his closing efforts effective?

___/ 0 No attempt to close	___/ 3 Not effective	___/ 5 No need to close	___/ 8 Yes, satisfactorily	___/ 10 Yes, outstandingly	

8. Did he promote the sale of additional goods or services?

___/ 0 No	___/ 3 Tried and failed	___/ 5 Used a "?" to suggest	___/ 8 Yes, but timing off	___/ 10 Yes, outstandingly	

9. Did he ensure customer satisfaction?

___/ 0 No	___/ 3 Tried and failed	___/ 5 Thanked customer only	___/ 8 Yes, adequately	___/ 10 Yes, outstandingly	

10. What was his personal effect on prospect?

___/ 0 Antagonizing	___/ 3 Negative	___/ 5 Neutral	___/ 8 Favorable	___/ 10 Extremely favorable	

11. How was his dress and grooming?

___/ 0 Unsatisfactory	___/ 5 Satisfactory	___/ 10 Outstanding	

GENERAL COMMENT:_________________________

TOTAL SCORE:_______________

CUSTOMER RATING SHEET

Customer______________________ Rater______________________

Salesperson______________________ Product or Service______________________

Directions to rater: Check the squares that best describe the customer's performance.

EXPLAIN OR GIVE EXAMPLE

1. Allowed the salesperson to determine need.

___/ 0 No	___/ 5 Partially	___/ 10 Yes	

2. Amount of product knowledge required of salesperson.

___/ 0 None	___/ 5 Some	___/ 10 Very much	

3. Objections raised.

___/ 0 None	___/ 3 One	___/ 5 Two	___/ 8 Three	___/ 10 Four	

4. Buying signals given.

___/ 0 None	___/ 5 One	___/ 8 Two	___/ 10 Three	

5. Allowed salesperson to close sale.

___/ 0 No	___/ 5 Only partially	___/ 10 Very definitely	

6. Difficulty of customer.

___/ 0 Easy	___/ 5 Fairly difficult	___/ 10 Very difficult	

GENERAL COMMENTS:______________________

TOTAL SCORE:______________

Number	Condition	Performance	Standard
804.01.01	Given a change fund of $30, a simulated till (see form in this section) and a Cash Report Form (also in this section)	the student will count his change fund, fill in, extend and total the "beginning cash" column on the cash report, and place the money in the simulated till	correctly
804.01.02	Given instruction in change making	the student will list from memory the seven steps in change making	with complete accuracy
804.01.03	Given fingering technique principles, a cash register, play money, sales tax chart, and a list of 3 merchandise transactions	the student will: a. ring up each transaction b. figure sales tax c. give proper change	using correct fingering and with 100% accuracy
804.01.04	Given a testor and a timer and the Cashier Qualifying Tests I, II, and III	the student will set up a cash till, fill in the beginning cash report, complete 6 transactions and balance out	in 5 minutes or less following each of the 7 steps for change making and balancing correctly
804.01.05	Given instructions for cashing checks and a number of correctly and incorrectly prepared checks (samples included in section)	the student will: a. explain when each of the three types of endorsements are used b. list the types of identification acceptable for cashing checks c. identify which of the checks are acceptable and explain why the others are not acceptable	 with complete accuracy with complete accuracy with 5 out of 6 correct
804.01.06	Given a salescheck	the student will identify the parts and list the uses for each part of the salescheck from memory	with at least 10 out of 14 correct

Number	Condition	Performance	Standard
804.01.07	Given saleschecks, the criteria for completing them, and salescheck problems including: a. cash take b. charge take c. cash send d. charge send	the student will complete the saleschecks	until he has correctly completed 3 legible, consecutive saleschecks for each type of transaction
804.01.08	Given a charge sales transaction, charge slip (sales draft) and charge card machine	the student will complete the sales transaction	legibly with complete accuracy

Number Instructional Ideas Notes

804.02.01 Objectives 804.01.01 through 804.01.03 are interrelated and should be taught in sequence. Some students will master these activities faster than others and, as soon as they have completed 804.01.04, can be used as teachers and testors for the slower students.

The simulated cash till used in 804.01.01 - 804.01.03 can be developed by the student on a sheet of book cover paper (approximately 18" x 10"). The students should be instructed to rule the paper into five approximately equal parts lengthwise and two widthwise parts so the top section is approximately 2/3 the width of the paper. A diagram of the till is included in this section.

804.02.02 Locate play money, both currency and coin denominations for change handling practice. Metal washers, when properly sized, may also be used for play money. Students should be taught from the beginning that all bills should be properly faced as they are placed in the cash register -- face up, top of head to right, and facing left.

The seven steps in change making include:
a. say how much out of how much
b. place customer's money on change plate
c. count change to self by "add-on" method
d. count change back to customer with "add-on" method, repeating charge and amount tendered
e. place money in till and close drawer
f. tear receipt, place with merchandise, and bag both
g. give merchandise to customer, smile, and say "thank you"

804.02.03 Handbooks that use standard cash register mock-ups can be used to teach correct fingering, pivoting and reaching prior to hands-on operations. Safeway's standard for checkers is 6 baskets with 25 items per basket to ring up in 18 minutes (3 minutes per basket) with no bagging, but making change. They use a 6 basket/30 minute test (5 minutes per basket) with bagging and change making. The teacher should be familiar with the jamming, releasing, and alternate procedures to open cash register drawers when jammed.

Number	Instructional Ideas	Notes
804.02.04	When pairing students for practice on speed and accuracy in change making, putting a slow and fast student together will facilitate much better learning for both students. Have one student be the customer and the second the cashier. After completing the problem, they will change places. Practice in change making should include problems in: a. short change situations b. the talkative and districting customer c. the undecided customer d. odd cent change making e. till tapping Skill development in cashiering should include setting up a cash till with a cash report form, completing a number of cash transactions including change making, counting the money in the till and completing the cash report form. Only complete accuracy is acceptable.	
804.02.05	Begin by having students write checks to each other and then present them for cashing. By practicing check writing, you can draw attention to the things to look for when cashing checks. For practice on check cashing, prepare a number of checks (some incorrectly) and have the students examine them for correctness. They should always explain why a check is unacceptable for cashing. As a bonus, have students bring into class samples of each type of acceptable identification. Each store has a different policy for cashing checks. The student should be encouraged to learn his store's policy as quickly as possible. The teacher should present the following information to the student: a. check verification "state" date post-dated written amount must agree with amount written in numbers address and phone number signature matches identification payee must be our store	

Number	Instructional Ideas	Notes
804.02.05	(continued) b. 2 party check policy c. 3 types of endorsements blank restrictive special d. types of accepted identification drivers license California identification card credit cards Develop mock ups or overhead transparencies of money substitutes and methods of endorsing and validating checks.	
804.02.06	In teaching sales slips, include sections from the training manuals of larger regional stores (Macys, Sears, Wards, Penney's, Bullock's, etc.). These show how to complete sales slips for many types of sales. The sample saleschecks included in this section can be duplicated or made into a transparency for teaching the parts of the salescheck, and question #6 on the Pre/Post Test is a form which could be duplicated for the test.	
804.02.08	Emphasizing legible printing and accurate transfer of information before the sales slip competencies will reduce the waste of practice forms. The teacher may want to vary the type of salescheck used by the students in these problems. This might be done by assigning two or three problems of each type to be done on a different salescheck used in the local community.	

Number Instructional Ideas Notes

804.02.08 (continued)

Charge card machines may be borrowed from local banks to complete this unit. They will also supply you with the charge slips (sales drafts) necessary for your students to practice. Credit cards may be obtained from the home office of some banks, or out-dated cards may be altered by removing part of the name and numbers for use in the classroom.

General:

A. Pool your cash registers in a school district and use them on a rotating basis from school to school.

B. Extra cash registers are sometimes kept by stores to train new employees for seasonal selling; therefore, they might be available to train students, either at the store or in the school.

C. Speakers from the local Retail Clerks Union are often available to explain training requirements and career potential in specific areas and sales seasons.

DECA
DEPARTMENT STORE

Dept	Sales No	Date
		/

NO. 0041

CUSTOMER RECEIPT
Cash Send
Charge Send

- -

NO. 0041

QUAN	ARTICLES	CL	PRICE	AMOUNT	
Authorized		Sales Tax			
		TOTAL			

Dept	Sales No	Date
		/

SALESCHECK ORIGINAL

Cash Take	1. Original stays with store
Charge Take	2. Carbon goes with merchandise
Charge Send	3. Tissue stays in sales book
Cash Send	

Charge or C.O.D. Name
Address
City State Zip
Customer's Signature
Circle one: CASH CHARGE COD

CHARGE NAME
Charge Take
Charge Send

- -

FROM:
DECA
Department Store

NO. 0041
ADDRESS LABEL

Send to:
Address
City State Zip
Delivery Instructions:

Dept	Sales No	Date	C.O.D. Balance	Initial
		/		

ADDRESS LABEL
Cash Send
Charge Send

INSTRUCTIONS FOR PREPARING CASH TILL

Give out textbook-cover paper (18" x 10") and rulers. Have each student draw divisions on the paper to resemble a cash till and label each section (as shown below).

Keys Rolls	$20	$10	$5	$1
50¢	25¢	10¢	5¢	1¢

CASH REPORT

BEGINNING			ENDING		
DEN	NO	AMT	DEN	NO	AMT
20.00			20.00		
10.00			10.00		
5.00			5.00		
1.00			1.00		
.50			.50		
.25			.25		
.10			.10		
.05			.05		
.01			.01		
TOTAL			TOTAL		

CASH REPORT

BEGINNING			ENDING		
DEN	NO	AMT	DEN	NO	AMT
20.00			20.00		
10.00			10.00		
5.00			5.00		
1.00			1.00		
.50			.50		
.25			.25		
.10			.10		
.05			.05		
.01			.01		
TOTAL			TOTAL		

CASH REPORT

BEGINNING			ENDING		
DEN	NO	AMT	DEN	NO	AMT
20.00			20.00		
10.00			10.00		
5.00			5.00		
1.00			1.00		
.50			.50		
.25			.25		
.10			.10		
.05			.05		
.01			.01		
TOTAL			TOTAL		

CASH REPORT

BEGINNING			ENDING		
DEN	NO	AMT	DEN	NO	AMT
20.00			20.00		
10.00			10.00		
5.00			5.00		
1.00			1.00		
.50			.50		
.25			.25		
.10			.10		
.05			.05		
.01			.01		
TOTAL			TOTAL		

CASHIERING QUALIFYING TEST I

Transaction (Tell cashier this amount of sale)	From (Give this money)
$3.47	$20 bill
2.08	$5 bill + 3 pennies
2.33	$10 bill
4.67	$5 bill + 2 pennies
3.41	4-$1 bills
1.77	2-50¢, 2-25¢, 3-10¢, 2-1¢

BE SURE CASHIER FOLLOWS EACH OF THE SEVEN STEPS EACH TRANSACTION:

1. How much out of how much
2. Place money on cash ledge
3. Count change to self
4. Count money back to customer, starting how much out of how much
5. Place money in till and close drawer
6. Tear receipt, put on merchandise, bag merchandise
7. Give back, SMILE, say "Thank you"

CASHIERING QUALIFYING TEST II

Transaction (Tell cashier this amount of sale)	From (Give this money)
$3.46	$20 bill
2.07	$5 bill + 2 pennies
.86	$1 bill
4.68	$10 bill + 3 pennies
2.36	$5 bill
1.92	$1 bill, 1-50¢, 1-25¢, 2-10¢, 2-1¢

BE SURE CASHIER FOLLOWS EACH OF THE SEVEN STEPS EACH TRANSACTION:

1. How much out of how much
2. Place money on cash ledge
3. Count change to self
4. Count money back to customer, starting with how much out of how much
5. Place money in till and close drawer
6. Tear receipt, put on mdse., bag mdse.
7. Give bag, SMILE, say "Thank you"

CASHIERING QUALIFYING TEST III

Amount of Sale (Tell cashier)	From (Give this money)
$8.29	$20 bill
1.66	$10 bill + 1 penny
7.37	$5 bill + 3-$1 bills
5.52	$10 bill
3.67	4-$1 bills + 2 pennies
1.34	2-50¢, 2-25¢, 4-1¢ ($1.54)

BE SURE CASHIER FOLLOWS EACH OF THE SEVEN STEPS IN EACH TRANSACTION:

1. How much out of how much
2. Place money on cash ledge
3. Count change to self
4. Count money back to customer, starting with how much out of how much
5. Place money in till and close drawer
6. Tear receipt, put on mdse., bag mdse.
7. Give bag, SMILE, say "Thank you"

No. 546 **First Student Bank** 1-830/260
Yuba City Union High School
Yuba City, Calif. 11/1 19
Pay to the order of Gayle's Department Store $26.—
Twenty five + no/100 Dollars
⑆0213⑈1208⑆ 525⑈1091

No. 547 **First Student Bank** 1-830/260
Yuba City Union High School
Yuba City, Calif. November 1 19
Pay to the order of Don's Supermarket $15.—
Fifteen + no/100 Dollars
⑆0213⑈1208⑆ 525⑈1091

No. 548 **First Student Bank** 1-830/260
Yuba City Union High School
Yuba City, Calif. November 1 19
Pay to the order of Friskes Fancy Flock Shop $33.20
Thirty-three + 30/100 Dollars
⑆0213⑈1208⑆ 525⑈1091

No. 549 **First Student Bank** 1-830/260
Yuba City Union High School
Yuba City, Calif. August 1 19
Pay to the order of Ima Department Store $25.—
Twenty five + no/100 Dollars
⑆0213⑈1208⑆ 525⑈1091

No. 550 **First Student Bank** 1-830/260
Yuba City Union High School
Yuba City, Calif. November 5 19
Pay to the order of Collegienne Sports $19.89
Nineteen + 89/100 Dollars
⑆0213⑈1208⑆ 525⑈1091

No. 551 **First Student Bank** 1-830/260
Yuba City Union High School
Yuba City, Calif. 19
Pay to the order of Coke Bar Botique $54.49
Fifty-nine + 49/100 Dollars
⑆0213⑈1208⑆ 525⑈1091

DECA

DEPARTMENT STORE

Dept	Sales No	Date
		/

NO. 0041

NO. 0041

QUAN	ARTICLES	CL	PRICE	AMOUNT	
Authorized		Sales Tax			
		TOTAL			

Dept	Sales No	Date
		/

Charge or C.O.D. Name

Address

City State Zip

Customer's Signature

Circle one: CASH CHARGE COD

FROM:
DECA
Department Store

NO. 0041
ADDRESS LABEL

Send to:

Address

City State Zip

Delivery Instructions:

Dept	Sales No	Date	C.O.D. Balance	Initial
		/		

DECA

DEPARTMENT STORE

Dept	Sales No	Date
		/

NO. 0041

NO. 0041

QUAN	ARTICLES	CL	PRICE	AMOUNT	
Authorized		Sales Tax			
		TOTAL			

Dept	Sales No	Date
		/

Charge or C.O.D. Name

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NO. 0041
ADDRESS LABEL

Send to:

Address

City State Zip

Delivery Instructions:

Dept	Sales No	Date	C.O.D. Balance	Initial
		/		

CASH TAKE SALESCHECK PROBLEMS

1. Mr. Yu Knowme of 2881 Bloyd Road, Simi, CA, comes into the Television Department (Dept. 480) and purchases a portable TV, with a 1 year warranty, class 48 for $98.99 and a small stand, class 47 for $9.88. He will pay cash and take the merchandise.

2. Mr. Ima Teacher of Ima High School, 1 Ima Street, Ima, CA 08011, comes into the Camera Department (Dept. 290) to buy camera supplies for his DE class. He decides on 4 boxes of 108 Polaroid color film @ $4.95 class 6, 4 boxes of super flashcubes class 7 @ $1.08, 2 boxes of 107 Polaroid black and white film @ $2.08 class 8, and 3 rolls of 127 film, 20 exposure @ $.96 class 4. The customer asks for a handwritten itemized receipt so he can get reimbursed.

3. Mrs. House Wife of 95 Liveit St., Home, CA 90063, comes into the Housewares Department (Dept. 670) and looks at 3 types of electric grills. She chooses one, class 14 @ $39.95 with a 1 year guarantee. She is paying cash but is concerned about having proof of the guarantee and insists on something in writing.

4. Jim Boyfriend of 1919 - 12th St., Your Town, CA 98043, comes into the Coke Bar Botique (Dept. 470) looking for a birthday present for a special friend. He decides on a sweater, class 12 @ $8.88, but does not know her size. You explain the liberal return policy of the store and he says he will take it and asks you to gift wrap it for him. The gift wrapping charge is 75¢ (you charge sales tax on gift wrapping). He will pay for it and take it with him.

5. Mrs. Fred Lee Farmer of Corn Stalk Route, Maise, CA 99307, comes to town to do some shopping. In the Sportswear Department (Dept. 390) she buys 2 pairs of slacks class 15 @ $4.95, 2 tops class 10 @ $3.95, and a swimsuit class 5 @ $10.95. She is paying cash, but your manager insists you write a salescheck for all swimsuits. Remember to write "Swimsuits are not returnable by law" on it.

6. Suzie Worth, tourist, is vacationing in Sunnysea, CA 90765, and stops in to do some shopping in the Womens Dept. (Dept. 330). She selects a backless long dress @ $39.95 class 13, and 4 pair of nude pantyhose class 8 @ $1.35. She wants a written sales slip in case after wearing one pair of pantyhose she doesn't like the style she has selected and wants to return them in her home town.

7. Freddie Frump of #1 Front Street, Friendly Face, CA 93900, walks into the Frisbes Fancy Flock Shop (Dept. 970) and decides to purchase five fushia frisbees @ $1.99 ea. class 5, one fancy football @ $6.98 class 1, and 3 pair of flock socks @ 4 for $3.68 class 12, and fights with the sales clerk over a mistake on the sales slip before paying cash and picking up his bag and freaking out.

CHARGE TAKE SALESCHECK PROBLEMS

1. Mrs. R. J. Lane, who lives at 1020 Amerind Avenue, Sportstown, CA 93412, has just bought several items from the Men's Sportswear Department (Dept. 515) and has asked you to charge them. The items are: 1 shirt class 5 for $5.95; 1 sweater class 7 for $15.95; and 1 robe class 12 for $25.00. When you call for authorization, you are given letter "Z". Mrs. Lane is taking the merchandise with her.

2. Mrs. John J. Johnson, 1450 - 35th Avenue, Babyland, CA 90000, came into the Infant's Department (Dept. 461) today. You waited on her, showing her crawlers, T-shirts to go with them, and sweaters. She has decided to buy 2 pair of crawlers, class 2 @ $2.99 each, 4 T-shirts class 7 @ 3 for $4.49, and 1 sweater class 3 @ $5.95. She is going to charge these and take them with her.

3. Mrs. R. J. Malcolm of 1997 Whimsy Street, Los Angeles, CA 90000, comes into the Bedding Department (Dept. 80) looking for something to wrap around her legs at football games. You show her a Pendleton Lap Robe in its cushion carrying case and she decides that is just what she wants. The lap robe is class 15, $22.50. She asks you to charge it, though she has forgotten her charge-card. When you call for authorization, they give you letter "F". Your customer will take this purchase with her.

4. Mr. Edward Fountainbleu, 1290 Chimeron Court, Scouts Bluff, CA 93210, comes into the Boy's Department (Dept. 550) for a scout uniform for his son. He gets a shirt at $3.95, trousers at $4.95, a neckerchief at $.75 and a neckerchief slide at $.15, socks at $.95, a belt at $1.10, and a knife at $2.50, charges and takes them. All scout merchandise is class 21.

5. Miss Shannon Lea, 1944 Grander Drive, Sacramento, CA 98971, comes into the Collegienne Sportswear Department (Dept. 375) and tries on a skirt, class 5 @ $14.95; 2 sweaters, class 7 @ $12.95 each; 1 pantsuit, class 22 @ $27.95; 1 bathing suit, class 9 @ $15.95; and a pair of bermudas, class 20 @ $8.95. She finally decides that she will charge the skirt, one sweater and the bermudas, and take them with her. The authorization code is "G".

6. Mr. William Goetz, 12295 McAdoo Blvd., San Francisco, CA 91776, comes into the Men's Suit Department (Dept. 540) and tries on several sport coats. He finally decides on one, class 12 that is $37.95. He is going to charge and take it. The authorization code is "Q".

7. Mrs. Ima Customer, 1000 Piedmont Ave., Brownieville, CA 97861, comes into the Girl's Department (Dept. 469) and buys 6 pair of Spanky Pants, class 3 @ $1.29 each; 12 pair of socks, class 5 @ 79¢ each; 2 slips @ $2.79 each, class 4; 2 pair of pajamas, class 9, 1 @ $2.29 and 1 @ $3.50. This is a charge take. If you call authorization, they will give you letter "R".

CASH SEND SALESCHECK PROBLEMS

1. Mr. Rupert J. Reindeer, 550 Wayward Way, Come Upem, CA 96789, comes into the Lingerie Department (Dept. 440) to buy his wife a Christmas present. You suggest a slip, a gown, and a negligee. He chooses the slip, class 12, for $9.95, and is going to pay cash for it. Then he asks you if it is possible to have the store gift wrap it and send it for him, and you tell him that it is one of the store services and you would be happy to do so. The gift wrap charge for an item that size is $1.50. Tax is charged on gift wrap.

2. Mrs. J. P Wade of 1700 Maple Street, Stockton, CA 99441, has just bought 4 sheets, class 2 @ $4.50 each; 4 pillows class 3 @ 2 for $2.99, and 2 towels, class 6 @ $3.99 each from the Linen Department (Dept. 60). She wants to pay cash for them, but they are too heavy for her to carry, so she asks you to send them.

3. Mrs. J. F. Smythe of 12 Clyston Court, Redding, CA 98949, is buying a sports jacket, class 20, for $34.95 in Men's Sportsweat (Dept. 515). She wants to pay cash for it and have us send it to her nephew, Mr. John Q. Brillig, 5300 Park Avenue, Apt. 957, New York, NY 00012. The postage will be $1.75. What about sales tax? Where do you write "Sent by"?

4. Mrs. J. L. Goodenough of 1925 East 18th Street, Long Beach, CA 94908, is shopping in the Bedding Department (Dept. 80) and buys 2 blankets. One, an electric blanket, class 6, costs $29.95 and has a one year guarantee. The other, class 8, costs $16.00. She is paying cash, but can't carry them, so asks you to send them.

5. Mr. J. Gregory Wong, 1906 - 5th Street, Crashtown, CA 93087, comes into the China Department (Dept. 651) and buys a set of dishes, class 15, that includes 4 dinner plates @ $3.75, 4 salad plates @ $3.25, 4 bread and butter plates @ $3.00, 4 cups @ $2.75, 4 saucers @ $2.25, and 4 bowls @ $2.50. He is paying cash, but wants the set delivered to his home.

6. Mrs. J. M. Jolly, 1440 Broadmoor Drive, Burnt, CA 90815, comes into Housewares (Dept. 670), and selects a Sunbeam Toaster as a wedding present for her niece. She is paying cash, and wants to have it gift wrapped ($1.75) and sent to Miss Julie Joyous, 1215 Bridal Blvd., San Lorenzo, CA 90999. The toaster costs $29.95 and is class 23.

7. George Smalley, 5687 Crowley Street, Oakland, is in the Record Department (Dept. 712) and selects 3 albums that he wants. He is paying cash, but would like them sent to him at college (Box 414, Halstead Hall, College, CA 93214). The albums are class 10 and cost $5.75 each. The postage to College will be $.95.

CHARGE SEND SALESCHECK PROBLEMS

1. Mrs. Allen W. Quillmaster of 1970 Fountainhead Road, Dapper City, CA 94903, came into the Handbag Department (Dept. 170) yesterday, asking to see alligator handbags (which are class 12). You waited on her, showing her one for $49.95, one for $59.95, and one on special for $65.00. She decided to talk to her husband before buying one. Now she has called you and asked you to charge the $59.95 bag and send it to her. Her phone number is 931-7442. If you call authorization, you will be given letter "H".

2. Mrs. Ralph J. Dooley, 1478½ Wawona Drive, Berkeley, CA 92528, phones you in the Yardage Department (Dept. 20). She asks you to charge and send her 4½ yards of the wool crepe, class 14, advertised at $1.65 a yard and 3 yards of rayon lining, class 20, at $.79 a yard. Her phone number is 632-1839. Authorization will give you "S".

3. Miss Beth Temple, 1725 - 45th Avenue, Wrinkle City, CA 99999, comes into Collegienne Suits (Dept. 373) and charges a suit, class 15, for $19.95. Since the hem must be altered (cost $2.00), you say you will send it to her when it is ready. Alterations are taxed.

4. Mr. Jack Pittman, 8900 Golden Drive, San Diego, CA 93484, comes into the Silver Department (Dept. 160) and asks you to charge a silver bowl, class 9, for $15.95, gift wrap it ($1.50), and send it to Mrs. J. V. Pittman, 7310 Holly Street, La Jolla, CA 93721. (This is just inside the free delivery zone, so there is no postage charge.)

5. Jane Habberdasher, 725 Ascot Drive, Bakersfield, CA 90483, comes into the Women's Sportswear (Dept. 381) to do some Christmas shopping. She orders an Italian knit sweater, class 9, $24.95; 2 blouses, class 12, @ $7.95 each; and 2 skirts, class 5, 1 @ $12.95, and 1 @ $15.95. She asks that these be charged to her and sent to various people. The sweater is to be sent to Mrs. Paul Jones, 1440 Smith Way, Oscarville, NE 54321 (postage $1.25); one blouse and the $12.95 skirt to Miss Ann Young, Oskie Hall, Chico, CA 95967 (postage $.65); the $15.95 skirt to Mrs. John West, 1700 Rilly Road, Yakima, WA 97601 (postage $.85). She will take the other blouse with her. If you call authorization, you will get letter "F".

6. Mr. John Taylor, 4319 Via Hacienda, Orinda, CA 98550, comes into the Radio and TV Dept. (Dept. 713) and orders a G.E. stereo set, style 1735, in walnut, class 15, $129.95, sent to his home. Authorization will give "K".

7. Miss Frieda Friendly, 1395 Jones Street, Castro Valley, CA 96568, comes into the Drapery Department (Dept. 690) and selects 4 pair of curtains, class 15, @ $9.95 a pair, to be charged and sent to her mother, Mrs. John Friendly, at the same address. Authorization is using letter "L".

Number	Condition	Performance	Standard
805.01.01	Given trade journals or business publications and Rating of Oral Communication Checklist	the student will prepare and give an oral report, demonstrating his ability to speak clearly and in a businesslike manner	receiving a rating of at least 70% (77 points)
805.01.02	Given opportunities to hear and observe business people in high positions	the student will complete the Business Language Test	answering 5 out of 6 questions correctly
805.01.03	Given 3 case problems, a teletrainer, and Telephone Techniques Rating List	the student will a. list general telephone techniques from memory b. demonstrate proper telephone techniques as either a caller or a callee	listing at least 10 out of 14 with at least 16 of the 20 techniques checked
805.01.04	Given a teletrainer and an item of merchandise	the student will demonstrate his ability to use descriptive terminology effectively by describing the item without giving its name or use	so that it can be recognized by at least 60% of the class
805.01.05	Given dictation of the Listening Test	the student will follow the instructions as dictated	with no more than 2 instructions missed
805.01.06	Given a demonstration of a physical skill	the student will instruct two other students in that skill	with his trainees able to demonstrate the skill and explain how it is done

Number **Instructional Ideas** **Notes**

805.02.01 The competency of speaking with poise is one that needs to be developed by being practiced during the entire program. Then each oral report can be rated until the student comes up to the required standard.

One way to have the class start this the first day is to require each student to stand and introduce himself, giving first and last name and at least one fact about himself (what he did that summer, the job he has or wants to have, his main hobby, etc.). A good follow-up is to have each student introduce the student behind him on the second day (this is more fun if you require students to change seats each day the first week) and the third and fourth days he is asked to introduce students sitting around him. (The teacher starts this by introducing one student and then asking him to stand and introduce the student on his left, or sitting diagonally to his right and behind him, etc.). Then the first test should include an item requiring the student to list all his classmates by first and last name.

Another system is to have the student interview another student in front of the class. He has to prepare his interview questions and should have at least a 5 minute radio-type interview.

Students can have fun and get practice also by giving 10-second commercials. The teacher has each student bring one empty container to class, and these go into a box. Then three students a day are required to reach into the box without looking, take one minute to read the product information, stand and give a 10-second commercial, translating the information on the carton into a customer benefit or sales appeal.

Another way to help the student become proficient in oral reports is to have another student give a one minute critique immediately after the report. (This helps listening, too.)

805.02.02 This should be done after the class has had a few guest speakers and has discussed how they spoke.

805.02.03 These case problems (and there are many that come with the teletrainer) should involve customer requests for information, giving and receiving orders, and using forms. If you type up cards for both the caller and callee, you can put in some surprises to keep the class awake too. One that often catches students is to have the caller, after telling the callee what he wants, ask him to repeat the information. If the student forgot a pencil, he is caught. (Telephone forms should be kept by the phones routinely.)

805.02.04 This game involves the whole class, and can be used throughout the time you have a teletrainer. One telephone is hidden from the class (put in the stockroom, the hall, or behind a screen) and a student caller is taken to this phone and given an item of merchandise and the instructions that he must describe it so that his callee can guess what it is, but he cannot use the name of the item, or how it is used.

805.02.05 One game for listening practice is as follows: The instructor or a student stands where the class cannot see him (in back of the room, for instance) and the class is instructed to close their eyes and follow the instructions they are given without talking at all. Then, eyes closed, the students must follow the instructions. (Give out a piece of paper and give the instructions for folding it into a paper airplane, for instance.) Be sure you have written the instructions first. Finally the instructor says, "Here's what it looks like," and the students may see what they have made, and what they were supposed to make. Most of them will be completely different. Indicate that this didn't work too well, so change the rules so that the students, still with their eyes closed, can now ask questions and give another set of instructions in the same manner, but this time answering questions. This should be followed immediately by a class discussion.

Another game for listening practice involves 5 volunteers. Send 4 of them out of the room and tell a story to the fifth one, slowly and carefully being sure you have it written down. Then send for one volunteer and have your fifth man retell the story to him. He in turn tells the story to the next volunteer and so on. You can use less than 5, but it does take at least 3 or 4 to get the effect. The last man finally has to repeat the story to the class. Then the original story is reread, and the class is asked to discuss what really happened.

Number **Instructional Ideas** **Notes**

805.02.05 (Continued)

It is very easy to make up a list of instructions (i.e., Take a sheet of binder paper. Put your name in the upper right-hand corner, etc.) and tape them. Have someone follow them as you are taping so that you allow enough time. By a five minute test with this you can quickly tell if further work on verbal directions is needed.

When discussing listening, the five requirements for good listening--attention, concentration, discrimination, questioning attitude, and acknowledgment--should be brought out.

805.02.06 This fits beautifully into the demonstration part of selling techniques. Take a simple skill (wrapping a tie around your finger to demonstrate how it would look tied is perfect, but wrapping a package, putting a glove on a customer's hand, and many others fit equally well) and demonstrate it to one student away from the class. He then practices doing it. Point out the teaching method--1) show and tell, 2) have learner try it and explain each step as he does so, 3) correct him when he makes a mistake, 4) have him continue to practice until perfect and take two other students to teach. They in turn teach two more, etc.

RATING OF ORAL COMMUNICATION

1. Enunciation

					Comments
☐ 0 Mush-mouth	☐ 3 slurs words	☐ 5 drops endings	☐ 8 speaks clearly	☐ 10 exceptionally clear	

2. Pronunciation

☐ 0 Many mistakes	☐ 3 several mistakes	☐ 7 missed a word or two	☐ 10 perfect pronunciation	

3. Vocal Expression

☐ 0 Monotone	☐ 3 little expression	☐ 7 sounds interested	☐ 10 clearly enthusiastic	

4. Loudness

☐ 0 Inaudible	☐ 3 can hear most words	☐ 7 can hear all words	☐ 10 good volume	

5. Tone of voice

☐ 0 Harsh, squeaky or syrupy	☐ 3 grates a bit	☐ 7 average	☐ 10 very pleasant	

6. Grammar

☐ 0 Many errors in grammar	☐ 3 a slip here or there	☐ 7 goofed once or had to pause	☐ 10 perfect easy grammar	

7. Vocabulary

☐ 0 No business terms	☐ 3 used one or two business terms	☐ 7 mostly businesslike	☐ 10 entirely businesslike	

8. Facial Expression

☐ 0 Bored	☐ 3 moderately interested	☐ 7 warms up to subject	☐ 10 enthusiastic	

9. Gestures

☐ 0 windmills or absolute stick	☐ 3 very little gesture or distracting	☐ 7 uses gestures but theatrical or teen	☐ 10 businesslike gestures	

10. Posture

☐ 0 Melts on podium	☐ 3 slouches, or leans or hands in pockets	☐ 5 fidgety	☐ 7 shoulders straight, but stands on one foot	☐ 10 good posture	

11. Eye Contact

☐ 0 Never looks at audience	☐ 3 glances at audience	☐ 7 looks mostly at listeners	☐ 10 good eye contact	

Business Language Questions

Instructions: Please answer each question as concisely as possible, using complete sentences except for the lists.

1. What is the name for the language used in business organizations?
2. How does this language differ from the language you use at school and how is it the same?
3. Give an example of a phrase you commonly use which would not be good to use at work.
4. Why should you learn the language of business?
5. Is there a difference in the language used by the top people in an organization and that used by the people in the lower ranks? Yes or no_______. If so, what is it?
6. Does the language you use have anything to do with your ability to supervise? Yes or no_______. If so, what is the relationship of language and supervision?

TELEPHONE TECHNIQUES RATING LIST

Instructions: Place a check mark on the line after each telephone technique that is correctly demonstrated.

General:
1. Identify business and self ______
2. Use correct grammar ______
3. Speak directly into the mouthpiece ______
4. Use a natural tone of voice, speaking clearly and distinctly ______
5. Have a pencil and paper or order form ______
6. Reflect a sincere, friendly manner ______
7. Make inquiries tactfully ______
8. Give information to be recorded slowly and distinctly ______
9. Record and verify necessary information ______
10. Use proper techniques when necessary to leave the line ______
11. Be attentive; display personal interest ______
12. Leave a pleasing impression ______
13. Express appreciation ______
14. Represent the business courteously and efficiently ______

Caller:
1. Verify the telephone number before calling ______
2. Dial carefully after hearing dial tone ______
3. Allow sufficient ringing time ______
4. Plan points to be covered ______
5. Explain the nature of the call clearly and concisely ______
6. Direct the conversation to a close in a prompt, yet tactful manner ______
7. Replace the receiver gently after closing remarks ______

Callee:
1. Answer promptly and pleasantly ______
2. Be well informed about merchandise, policies, etc. ______
3. Volunteer helpful information ______
4. Give explanations effectively ______
5. Ask leading questions ______
6. Wait for caller to hang up first ______

Total ☐

LISTENING TEST

The following instructions (which comprise the self test) should be put onto a tape or dictated, at a fairly slow pace, in a calm tone of voice. Timing, where given, should be exact.

Get a piece of lined paper, and a pencil or pen. You have thirty seconds to get them.

Fold the paper in half so the upper right-hand corner meets the upper left-hand corner, and crease it carefully.

Open it again; and starting on the second line from the top, number from one to fifteen on the right-hand side of the crease--and next to it.

On the left-hand side of the crease, next to the numbers you have written, letter from A to O.

Write your name on the third line from the bottom in the lower left-hand corner.

Print the date on the top line--starting at the left.

On the line you numbered 11 and to the left of the letter, print your birth date.

Put the name of the class you are in at the upper right-hand corner.

Turn the paper sideways so that the top margin is on your right and put Roman Numerals one through ten in the spaces between the lines at the top of the page starting with the third space from the right and working toward your left.

Turn the paper to its original position and on the lines you have numbered one through five, list the five requirements of good listening. You have one minute.

Turn the paper over and on the back write the number of these instructions you think you followed correctly. There were ten instructions.

Stop the tape recorder and please rewind it to the beginning of this test.

Number	Condition	Performance	Standard
806.01.01	Given a presentation stating various types of customer service	the student will: a. identify different customer services that stores provide b. analyze each customer service in terms of profit	with at least 6 types of customer services identified with no exceptions
806.01.02	Given - a store policy on authorized check cashing - the principles of check cashing (Competency 804) - 5 checks submitted for processing	the student will either authorize or refuse the customers' checks	accurately
806.01.03	Given role playing situations involving customer complaints	the student will courteously handle the complaints	with 3 out of 4 satisfactory as determined by teacher
806.01.04	Given a case study concerning a customer complaint	the student will consider the complaint to be an opportunity to correct a possible fault in the store operations and write a solution	to the teacher's satisfaction
806.01.05	Given information on delivery service and Delivery Service Advantages and Disadvantages Sheet	the student will identify both the advantages and disadvantages that delivery service offers to customers and to the store	with 75% accuracy
806.01.06	Given a store's policy for customer accommodation services, two items to be exchanged, two return items, and the appropriate forms for these transactions	the student will demonstrate his ability to transact routine exchanges and returns, completing the necessary forms	with all forms correctly completed

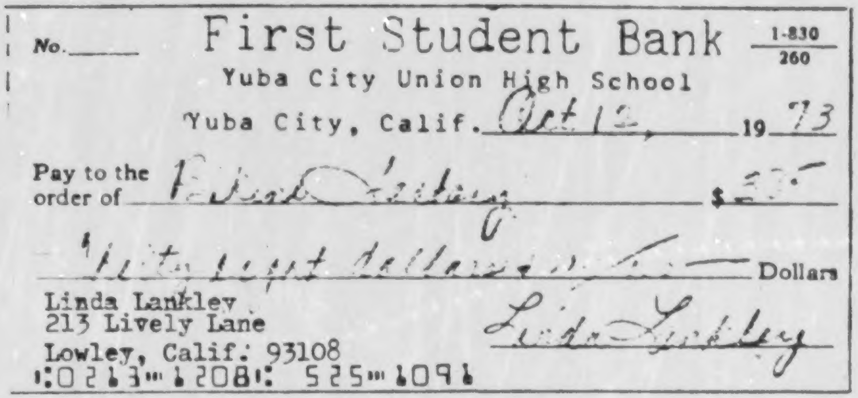
Number	Condition	Performance	Standard
806.01.07	Given the purpose of a customer service desk	the student will list 5 types of services that could be performed at a customer service desk	accurately
806.01.08	Given a store's credit policies and Credit Application	the student will explain the store's credit policy (all accounts) to a customer and help him complete the application form	to the satisfaction of the instructor

Number	Instructional Ideas	Notes
806.02.01	Have the students visit businesses in the area to determine the kinds of accommodation services offered. Some of the customer services might be exchanges, returns, warrantees, alterations, installation, credit, check cashing, repairs, and taking special orders. Students could also survey those stores that offer shopping convenience services. They often have a service desk and personnel to sell tickets or provide information, cash checks, or collect money for utility bills. These stores sometimes offer restrooms and babysitting services as well. Identify services in various stores that exist only to build goodwill and those which provide profit for the store.	
806.02.02	The teacher can use check cashing policies from a local store or use the policies and customer identification shown in the pre-test.	
806.02.03	In this role playing situation, one student can be an adjustment clerk, with others coming to him with problems. If the teacher desires, common complaints can be typed up on cards for the customers. Students, given a chance, can be very creative in thinking up other complaints once the situation has gotten underway.	
806.02.04	An example of such a complaint is in the pre-test. Other instances may come from the students' experiences or from an interview with the Adjustment Manager of a large store or other store personnel.	
806.02.05	A guest speaker from UPS could give this information, but assigning a student to interview UPS, another to REA, etc., and having each report or act as a panel member would be an excellent way to provide information about local delivery services as well as general information.	
806.02.06	Here again there is an example of such a policy in the pre-test, but sending students to local stores to research their policies, forms, etc., would be preferable, if it is possible.	

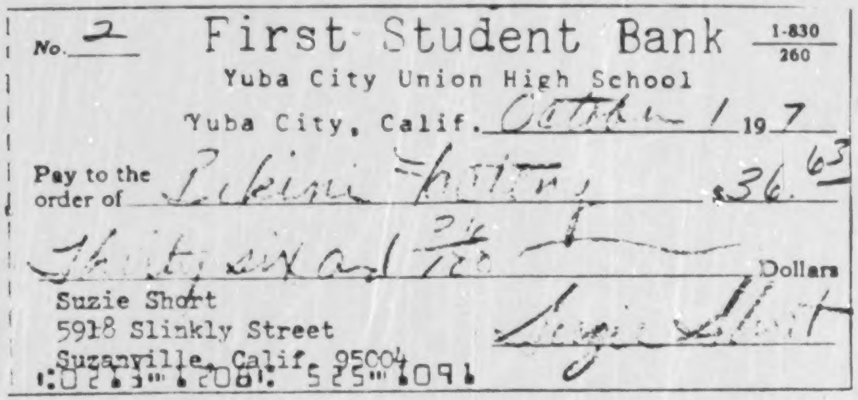
Number	Instructional Ideas	Notes
806.02.07	Simulate a customer service desk or department with a store policy, procedure for operating it and a store directory. Have students demonstrate giving information on the location of merchandise, writing up exchanges and returns, and handling requests for lost and found merchandise, personal items and children.	
806.02.08	Explain the three C's of credit. Review truth-in-lending regulations and consumer protection legislation and emphasis on interest charge. Identify the procedure used to maintain accounts, sales records, billing procedures, and the collection of overdue bills. Transparencies are especially effective.	
General:	Speaker or Visitation Activities. Invite a resource person to discuss store policies and procedures for checking and approving credit. A representative from a collection agency may be a good resource person to discuss collection of overdue accounts. (These people should be carefully screened prior to class visit.) Point out the cost involved to the store for customer services such as mail, telephone, delivery, storage, shipping and gift wrapping which adds to customer convenience, goodwill and cost in larger retail stores.	

The following checks have been submitted for payment; either authorize or refuse the customer checks.

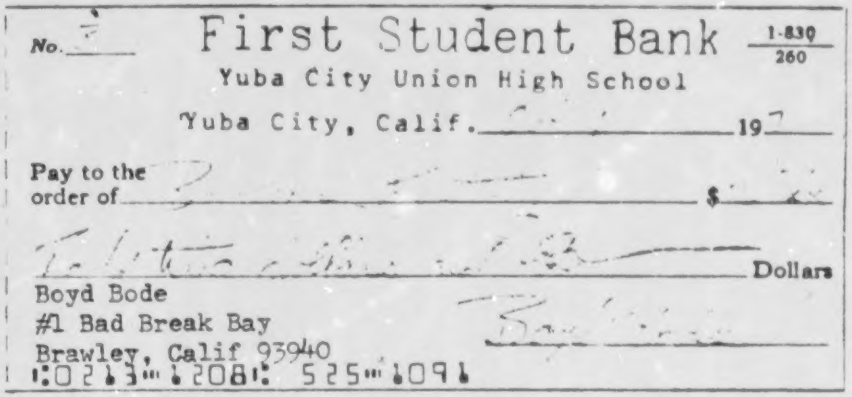
Record your information on the next page on the back of the checks.



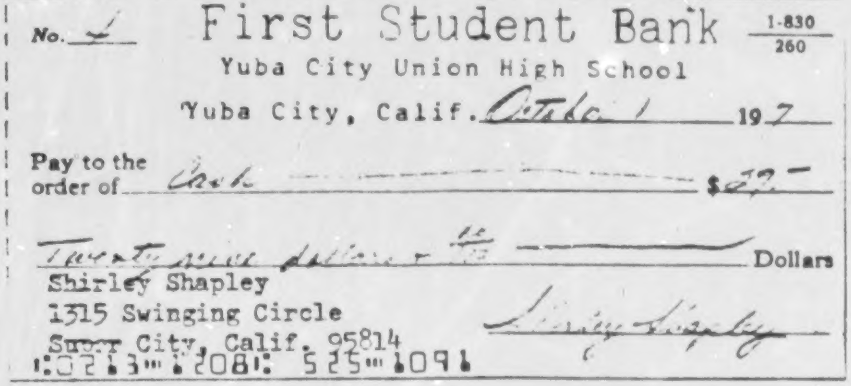
No.
First Student Bank 1-830/260
Yuba City Union High School
Yuba City, Calif. Oct 12, 1973
Pay to the order of [illegible] $58—
Fifty eight dollars [illegible] Dollars
Linda Lankley
213 Lively Lane
Lowley, Calif. 93108
Linda Lankley
⑆0213⑈ 1208⑆ 525⑈1091



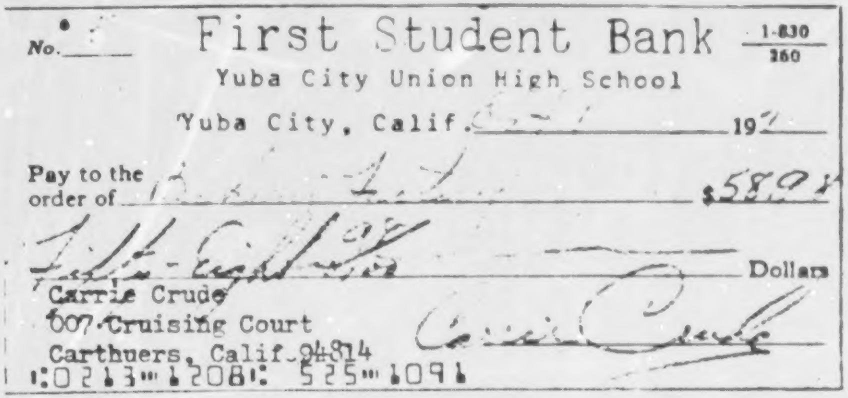
No. 2
First Student Bank 1-830/260
Yuba City Union High School
Yuba City, Calif. October 1 197
Pay to the order of [illegible] $36.63
Thirty six and [illegible] Dollars
Suzie Short
5918 Slinkly Street
Suzanville, Calif. 95004
Suzie Short
⑆0213⑈ 1208⑆ 525⑈1091



No. 3
First Student Bank 1-830/260
Yuba City Union High School
Yuba City, Calif. [illegible] 197
Pay to the order of [illegible] $ [illegible]
[illegible] Dollars
Boyd Bode
#1 Bad Break Bay
Brawley, Calif 93940
Boyd Bode
⑆0213⑈ 1208⑆ 525⑈1091



No. 4
First Student Bank 1-830/260
Yuba City Union High School
Yuba City, Calif. October 1 197
Pay to the order of Cash $29—
Twenty nine dollars [illegible] Dollars
Shirley Shapley
1315 Swinging Circle
Sugar City, Calif. 95814
Shirley Shapley
⑆0213⑈ 1208⑆ 525⑈1091



No.
First Student Bank 1-830/260
Yuba City Union High School
Yuba City, Calif. [illegible] 197
Pay to the order of [illegible] $58.9
Fifty-Eight [illegible] Dollars
Carrie Crude
007 Cruising Court
Carthuers, Calif. 94814
Carrie Crude
⑆0213⑈ 1208⑆ 525⑈1091

Record the customer identification on the back of the checks. Write on the checks either authorize or refuse and initial. If refused, state reason why.

1

2

3

4

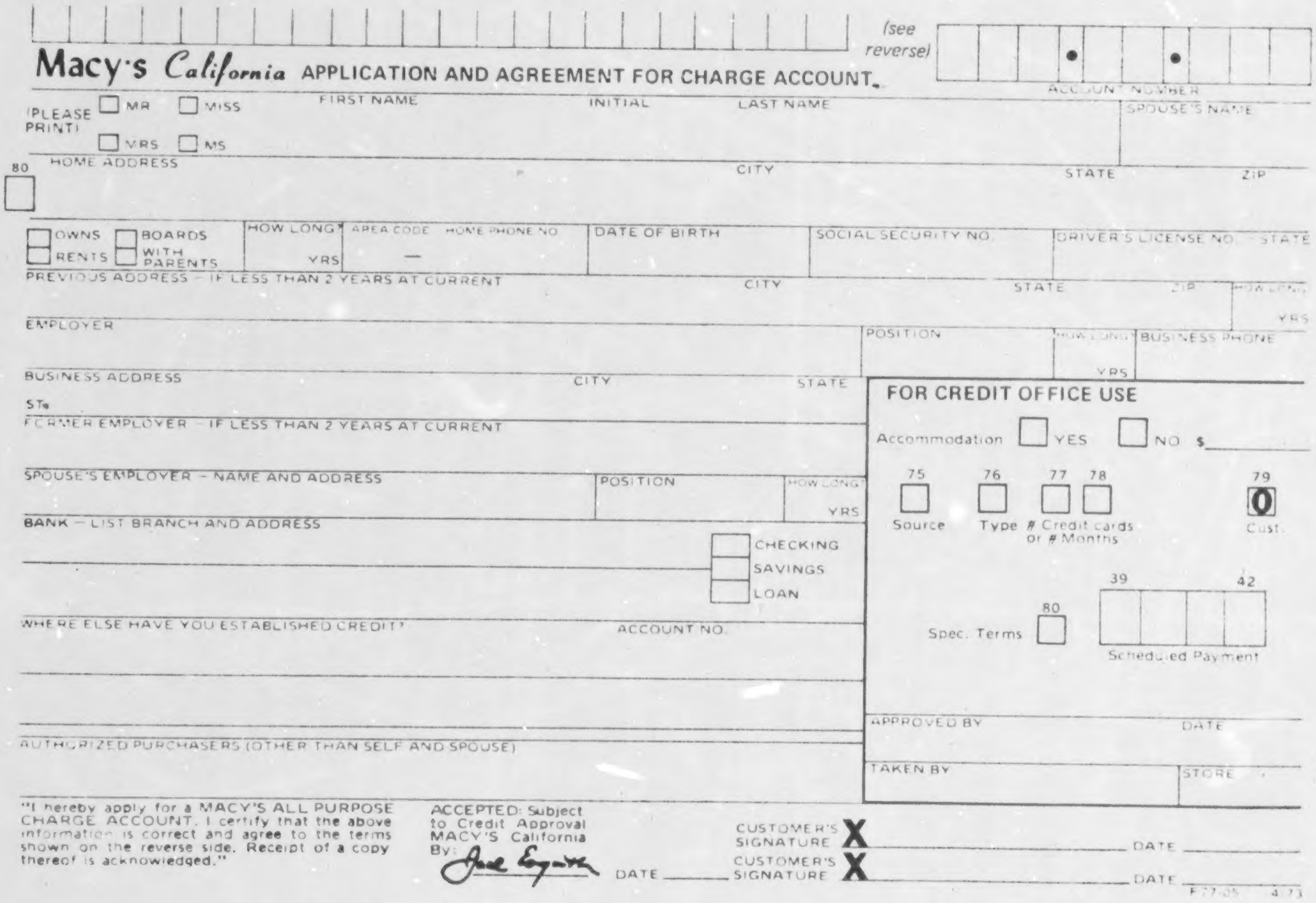
5

STORE DELIVERY ADVANTAGES & DISADVANTAGES

Store delivery service offers to the:

Customer		Store	
Advantage	Disadvantage	Advantage	Disadvantage
1.	1.	1.	1.
2.	2.	2.	2.
3.	3.	3.	3.
4.	4.	4.	4.

Credit Application



(see reverse) ☐☐☐ • ☐☐ • ☐☐☐ ACCOUNT NUMBER

Macy's California APPLICATION AND AGREEMENT FOR CHARGE ACCOUNT.

(PLEASE PRINT) ☐ MR ☐ MISS ☐ MRS ☐ MS FIRST NAME INITIAL LAST NAME SPOUSE'S NAME

80 ☐ HOME ADDRESS CITY STATE ZIP

☐ OWNS ☐ RENTS ☐ BOARDS ☐ WITH PARENTS HOW LONG? YRS AREA CODE HOME PHONE NO. — DATE OF BIRTH SOCIAL SECURITY NO. DRIVER'S LICENSE NO. STATE

PREVIOUS ADDRESS — IF LESS THAN 2 YEARS AT CURRENT CITY STATE ZIP HOW LONG YRS

EMPLOYER POSITION HOW LONG YRS BUSINESS PHONE

BUSINESS ADDRESS CITY STATE

STe

FORMER EMPLOYER — IF LESS THAN 2 YEARS AT CURRENT

SPOUSE'S EMPLOYER — NAME AND ADDRESS POSITION HOW LONG YRS

BANK — LIST BRANCH AND ADDRESS ☐ CHECKING ☐ SAVINGS ☐ LOAN

WHERE ELSE HAVE YOU ESTABLISHED CREDIT? ACCOUNT NO.

AUTHORIZED PURCHASERS (OTHER THAN SELF AND SPOUSE)

FOR CREDIT OFFICE USE

Accommodation ☐ YES ☐ NO $______

75 ☐ Source 76 ☐ Type 77 ☐ 78 ☐ # Credit cards or # Months 79 ☐ 0 Cust.

80 Spec. Terms ☐ 39 ☐☐☐☐ 42 Scheduled Payment

APPROVED BY DATE

TAKEN BY STORE

"I hereby apply for a MACY'S ALL PURPOSE CHARGE ACCOUNT. I certify that the above information is correct and agree to the terms shown on the reverse side. Receipt of a copy thereof is acknowledged."

ACCEPTED: Subject to Credit Approval MACY'S California By: DATE ______

CUSTOMER'S SIGNATURE X ______ DATE ______

CUSTOMER'S SIGNATURE X ______ DATE ______

F77-05 4/73

Courtesy of Macy's

Number	Condition	Performance	Standard
807.01.01	Given a presentation demonstrating how company benefits (return business, store reputation, etc.) are the results of positive company image through good customer relations	the student will:	by citing:
		a. choose those employee actions that best represent the image of the company	at least 3 examples of positive employee-customer relations
		b. list the benefits the company gets from good customer relations	at least 4 company benefits
		c. list the benefits to the salesperson from good customer relations	at least 2 employee benefits
807.01.02	Given information on employee attitudes	the student will:	
		a. make a list of at least 5 positive and 5 negative salesperson attitudes towards customers	with complete accuracy
		b. write probable customer reactions to both positive and negative attitudes	to the teacher's satisfaction
807.01.03	Given the dress standards for three stores	the student will identify the type of store, probable merchandise and market from a description of the employees' appearance	correctly identifying at least 2 of the three factors
807.01.04	Given three case problems on customer relations and the "golden rule" as a criterion	the student will write a solution for each situation that would satisfy his manager, his customer and himself	with at least one correct solution for each case

Number	Condition	Performance	Standard
807.01.05	Given the principles of good customer relations, which are: - Speak to people - Smile at people - Call people by name - Be friendly, take a genuine interest in people - Be generous with praise, cautions and criticism, and considerate of others' feelings - Be thoughtful of others' opinions - Be alert and prepared to give service	the student will: a. list them from memory b. write how he would apply each for one of the following customers as assigned by the teacher - male teenager - female teenager - businessman - elderly woman - elderly man - secretary - housewife - woman carrying baby - construction worker, etc.	listing at least 5 accurately with at least one application per principle
807.01.06	Given a simulated sales situation involving a salesman and customer	the student will demonstrate friendliness, enthusiasm and genuine interest in the customer or write how he would demonstrate each	as judged by the class and/or teacher or with at least 2 ways he could show each
807.01.07	Given a list of good work habits which are: - Maintain a positive attitude - Use self control - Be honest with time, money, stock and records - Accept criticism and use it to grow - Be neat, orderly and systematic - Develop an objective viewpoint - Be willing to do anything needed - Take the initiative to practice good human relations - Adjust easily to changes - Use initiative in finding things to learn and work to do	the student will: a. list the good work habits from memory b. give an extemporaneous 2-minute speech on the importance and meaning of one of them as assigned by the teacher	with 8 out of 10 correct with a 60% rating on the Rating for Oral Communication Checklist and to the satisfaction of the teacher

Number	Condition	Performance	Standard
807.01.08	Given a presentation covering the interdependence of departments and employees in a business	the student will: a. identify a minimum of 5 reasons why a person at work needs to get along with his co-workers b. develop a list of things he can do to get along well with co-workers	with at least 4 out of 5 reflecting the interdependence of departments with at least 10 items listed
807.01.09	Given an employer point of view role playing situation	the student will identify the traits of a "model employee"	with at least ten traits judged appropriate by the majority of the participating students and/or instructor
807.01.10	Given case problems on human relations with co-workers and supervisors	the student will identify the problem, provide two or three possible solutions, select one solution and explain the reasons for his selection	with each student analysis containing all 4 parts and a realistic solution for each type of case

Number	Instructional Ideas	Notes
807.02.01	Invite a businessman to speak to your students about the importance of good customer relations and how they affect the business and the worker. If there is a large enough store in your area, the Adjustment Department Manager can often do this well.	
807.02.02	To check the accuracy of salespeoples' attitudes, have the students go into assigned stores to see what the salespeoples' attitudes are toward them and toward other customers. If they go with a list, have them rate the salespeople after leaving the store. Since students often feel that teenagers are treated poorly, have them notice especially how the salespeople treat other customers. If you are in an area where students have quick and easy access to stores, you can have them do this immediately. Otherwise it works well to allow a week for them to go observe, and running the employer-employee-customer relations unit one day a week is often a good system, since it allows a regular time to talk about human relations problems that arise, and gives up to a whole semester to develop attitude changes. If you have students observe, compile the data they bring back by outlining the checklist on the board and having each student tally his results on it.	
807.02.03	Many stores have printed copies of dress standards, but even those who don't have quite definite ideas on what is and is not acceptable. In the large stores, try the Personnel or Training Departments. If a student is working at a small store, he might be encouraged to make up a sheet of dress standards for that store.	

Number Instructional Ideas Notes

807.02.04 Case problems might include such situations as:

a. A young couple enters a restaurant with a crying baby. You are a waitress or waiter. Your manager is in the kitchen.

b. An old lady is standing just inside the front door of the large department store you work in. You enter just behind her, on your way to work.

c. You have just completed selling a customer two bedspreads, six sheets, and two bed pads, which fill three large bags. She tells you her car is in a parking lot three blocks away and you are the only salesperson on the floor at the minute. (This is a good place to bring out that you should never promise more than you can do. Misrepresentation is the worst kind of customer relations.)

807.02.05 The customer types can be assigned to students serially or to small groups or both. The key question here is, Can the student relate to the customer types enough to decide what might please each type? The teacher can also use these principles in talking about co-worker relations.

807.02.06 This demonstration of friendliness, etc., can be combined with the sales demonstration, rather than being a separate activity. Or a couple of students can demonstrate with the rest of the class writing how this can be done.

807.02.07 Try dividing the class into groups of 10 and have each student lead a discussion on the meaning and importance of one of the work habits. The leader should be instructed that his job is to involve each of the group and report to the class on their findings.

Students who are not presently working, as well as many who are, may tend to take a student, rather than an employee, point of view and need a good deal of reinforcement. The same list can also be considered from the management point of view, so it would be possible to have two activities based on it.

Number **Instructional Ideas** **Notes**

807.02.07 (continued)

Have students individually or in small groups take the list and guidelines on conducting an interview and interview a store manager, department manager or supervisor to determine his opinion of the traits of a good employee and his ranking of the work habits. Other possibilities for interviewees might be interviewers from the Human Resource Development Agency, office managers, personnel and training managers, etc.

After each student is thoroughly acquainted with the material, the teacher can list each habit on a 3 x 5 card, put them all in a hat and have a student or two draw a card and give a talk--and then go on with that day's lesson. That way this can take only 5 minutes a day and retain the students' interest.

807.02.08 This presentation could be made by a guest speaker or could be researched and presented as a panel discussion by students or resource people. If possible, a videotape of the presentation can be used over and over again to reiterate the content, to point out vocabulary, speech patterns, etc.

One way to point up the interdependence of various departments might be to set up a situation where the members of, for instance, the sportswear department have been very rude for sometime to the people who work in the credit department. Then have a small group of students try to think of all the things the people in credit might do to get back at the people in sportswear, (refuse to authorize sales, etc.) and what that might do to the sportswear employees and to their customers. Use a wide variety of departments, and have each group report on a different set.

807.02.09 The role playing can be done individually, as a group brainstorming activity, or both. One method that has worked is to start with the student taking the role of an employee and developing a list of traits for the ideal employer. Then he takes the role of the employer to develop a list of traits for a model employee.

Number **Instructional Ideas** **Notes**

807.02.09 (continued)

Some of the traits of an ideal employer might be: Fair, reasonable, explains clearly, organized, even tempered, considerate, tactful, sincere, helpful in emergencies, interested in the welfare of his employees, generous with praise, and criticizes constructively.

Some of the traits of a model employee might be: Dependable and punctual, positive and enthusiastic in attitude, honest with time and money, friendly and considerate of others, persistent in completing tasks, accepting of criticism and willing to change, responsible, courteous, takes initiative, self confident, does more than his share, keeps business information confidential, and is loyal.

Once the traits for a model employee have been listed, then each student can rate himself on a five point scale for each trait, select the trait he feels needs to improve most and write a paragraph about the trait he has selected and his plans to improve.

There is no point in initiating that activity, however, unless it is followed to its natural conclusion, with a written plan for improvement (a daily check-off helps) including a time limit and at least one written review of his progress or lack of it, including an analysis of why he has or has not progressed and a plan for further action. This can be an excellent opportunity for the teacher to meet briefly with individual students to consider their progress toward employability or promotability.

807.02.10 There are many many case problems available, but better than any case is any real situation that a student brings in for discussion or permits the instructor to bring up for discussion.

Some of the common co-worker problems include: workers involved in sales stealing, old grouch co-workers, buddy-buddy co-workers, gossiping, the department clique, or Mr. Know-It-All. A review of the principles of customer relations and discussion of their applicability in co-worker problems might be useful.

807.02.10 (continued)

Some of the common employer problems include: the boss' bad day, incomplete instructions, the "good guy" boss, boss' pet, etc.

Experience has proved that students often have difficulty with the four-step method of problem solving, often being unable to even identify the problem. For this reason it is likely to take a great many analyses for a given student to come up with an acceptable one for each of the types of cases, and group discussions and examples may need to be repeated before this competency is achieved.

Number	Condition	Performance	Standard
808.01.01	Given the definition of sales promotion	the student will list at least six external and five internal media	with at least nine of the eleven correct
808.01.02	Given information on the use of promotional activities	the student will list the promotional activities (gimmicks)	with seven of the nine types listed correctly
808.01.03	Given information on promotional and institutional sales promotions	the student will: a. explain each b. compare the purpose and similarities and differences of the two	correctly to the teacher's satisfaction
808.01.04	Given the definition of "sales" as special sales promotions	the student will list ten kinds of sales	with 80% accuracy
808.01.05	Given the Promotional Follow-up Survey, and instructions on taking the survey, and/or the Sales Promotion Case Problem	the student will write conclusions on the responsibilities of a salesperson toward the store's promotional activities	to the teacher's satisfaction

Number | Instructional Ideas | Notes

808.02.01 Brainstorm the following promotional media:

a. Definition of Sales Promotion is:
   1. In a very broad sense all activities and devices designed to sell more merchandise and to create goodwill, directly or indirectly
   2. Any special effort taken to improve business, retain existing customers, and attract new customers

b. External media
   1. Newspapers
   2. Magazines
   3. Shopping publications
   4. Direct mail
   5. Outdoor signs
   6. Radio
   7. Television
   8. Sky writers

c. Internal media
   1. Tear sheets
   2. Manufacturers' literature
   3. Merchandise tags and labels
   4. Posters
   5. Public address systems
   6. Window displays
   7. Interior displays
   8. Telephone calls

808.02.02 Have the students brainstorm the following promotional activities to develop the list:

a. Sales of all kinds (covered in 808.02.04)
b. Trading stamps
c. Promotional games
d. Fashion shows

Number Instructional Ideas Notes

808.02.02 (continued)

e. Trade fairs
f. Free gift offers
g. Special shopping events
h. Special holiday promotions
i. Publicity
j. Business cards

808.02.03 The Types of Sales Promotion chart was designed to assist the student to go into the local stores and to research the local media, to locate sales promotions and identify them as being either institutional or promotional.

808.02.04 Brainstorm the following types of sales:
a. Clearance sale
b. Birthday sale
c. Dollar sale
d. National holiday sale
e. Seasonal sales (i.e., January White Sales)
f. Warehouse sale
g. Carload sale
h. End of month sale (EOM)
i. Sidewalk sale
j. Grand opening sale

808.02.05 For the survey, students should be looking for:
a. Salesperson's information on the merchandise in the advertisement
b. Salesperson's attitude toward helping the customer

It would be wise if the student did not tell the store personnel that this is a school assignment and did not fill in the form while in the store.

After completing the Promotional Follow-Up Survey, students will be prepared to discuss the Sales Promotion Case Problem. The case study

Number	Instructional Ideas	Notes
808.02.05	(continued) could be discussed in class and then completed by writing out answers to the five questions. Optionally, for the advanced student, an Evaluation of a Sales Campaign and the response sheet for it are included.	

PROMOTIONAL FOLLOW-UP SURVEY

I. Advertisement Information

Store________________________ Type________________________

Store facts in ad________________________

Merchandise being advertised________________________

Merchandise facts________________________

____

____

II. In Store Information

A. Window displays showing advertised merchandise. Yes_____ No_____

If yes, give details________________________

____

B. Information received from first salesperson met (also look for attitude)________________________

____

C. Is there an interior display on the advertised merchandise? Yes_____ No_____

If yes, relate distance between display and advertised merchandise________________________

____

D. Information received from second salesperson (if applicable) about the advertised merchandise (look for salesperson knowledge about the sales promotion)________________________

____

SALES PROMOTION CASE PROBLEM

Janie works for the XYZ Department Store. She is a high school distributive education student who has only been on the job for two weeks. Right now the store is at the end of its back-to-school promotion. Janie works in the Teen Shop. On this particular day a woman comes into the department when Janie is there alone and asks for the skirts that were advertised in the paper the night before. Janie knows nothing about them, and there is no one to ask, so she tells the woman that she thinks they must be in the Girl's Department -- over in the corner. Then the woman asks her where she can find the boy's shirts that are also on sale. Janie tells her that Boy's Wear is on the first floor, but now she feels rather unsure of where those shirts really are. The woman leaves, and when Mrs. Brown returns to the floor, she asks if she knows anything about a skirt that was advertised. Mrs. Brown says, "Yes, of course.", and then takes the next five minutes to tell her about these new fashion skirts in the wonder fabric that are hanging three steps away. Janie knows the woman won't return to the department for the skirts again, and feels pretty foolish.

1. What mistakes did Janie make with the woman and the skirts?

2. Should she have known about the boy's shirts too? Why?

3. What information should Janie get in order to fulfill her responsibilities?

4. How could Janie ensure that she doesn't ever get into that situation again?

5. What are an employee's responsibilities toward his (a) store's advertising? (b) window display?

TYPES OF SALES PROMOTION

Instructions: Identify the sales promotions from an ad in a local newspaper and determine whether each one is promotional or institutional.

Identify Sales Promotion	Promotional (selling products)	Institutional (building goodwill)
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		

EVALUATION OF A SALES CAMPAIGN

Answer the following:

Type of store(s)______________________________ Number of store(s)__________

Store name(s)____

Starting Date__________ Finishing Date__________ Target Market: Age____ Sex______

Campaign Theme____

Complete the following outline:

A. Media Used (attach printed media)

   1. External media

   2. Internal media

B. Promotional Activities (gimmicks) Used

   1. Activities

   2. Explain how they were used

C. Type of Promotion: Institutional____ Promotional____

D. Was a special sales event used? Yes____ No____ If yes, 1) what type?

   2) Explain how it was used.

E. Was this an off-season campaign? Yes____ No____ If yes, explain how it was used, covering the five advantages.

F. Were the sales personnel informed? Yes____ No____ If yes, give information.

EVALUATION OF A SALES CAMPAIGN (continued)

G. Were there sales promotional activities in the store? Yes_____ No_____ If yes, explain what types.

H. Identify the promotional objective evidenced in the campaign and explain how you determined if they were aiming at that objective.

I. List the steps in planning a sales campaign and explain what they did in each step.

CASE PROBLEM RESPONSE SHEET

This special section is for the advanced student, and is based on the case problem in Part II of the pre/post test.

1. Is this an off-season promotion? Yes____ No____ Explain________________________________

2. List the advantages of an off-season sales promotion from the businessman's point of view.
   1)________________________________
   2)________________________________
   3)________________________________
   4)________________________________

3. What would be the target market for this promotion?________________________________

4. Add three more media to be used in this promotion and justify each:
   a.________________________________
   b.________________________________
   c.________________________________

This special section is for the advanced student, and is based on the case problem in Part II of the Pre/Post Test.

1. Is this an off-season promotion? Yes____ No____ Explain________________

____

____

2. List the advantages of an off-season sales promotion from the businessman's point of view.

1.________________

2.________________

3.________________

4.________________

3. What would be the target market for this promotion?________________

____

4. Add three more media to be used in this promotion and justify each.

1.________________

____

2.________________

____

3.________________

____

Number	Condition	Performance	Standard
809.01.01	Given a list of seven causes of inventory shortages in stores	the student will write possible ways of reducing these losses	for at least five out of the seven causes
809.01.02	Given Case Problems on the Storing and Arranging of Merchandise	the student will identify poor stockkeeping practices in each case	with 75% accuracy
809.01.03	Given Safety Rules and Retail Situations Case Problems	the student will list the safety rules that should be applied in each situation	with 80% accuracy
809.01.04	Given instruction on the responsibilities of a buyer, a merchandise manager and a salesperson	the student will write why each needs to know exactly how much stock is on hand	with at least one correct reason for each
809.01.05	Given a request for rules on taking physical inventory	the student will list the rules from memory	accurately
809.01.06	Given a Retail Inventory Sheet	the student will explain the purpose of each section of the Retail Inventory Sheet	with at least ten out of fourteen correct
809.01.07	Given stock cards	the student will identify the source of information for each section	completing the entries accurately

Number | Instructional Ideas | Notes

809.02.01 According to various sources, the main cause for inventory shortages are:

a. shoplifting
b. employee theft
c. breakage and damage
d. inaccurate marking
e. errors in recording
f. inaccurate inventories
g. careless record keeping

Generally speaking, inventory losses are a store's major source of losses. A rather small decrease in the inventory shortages can make a large difference in profits. While discussing this, the teacher can also bring out that the careful use of supplies can also make quite a difference in a large company over a year.

809.02.02 Normally the location and arrangement of goods is a very important factor in selling. Rules for keeping stock would include:

a. Have the merchandise in logical order both in the stockroom and on the selling floor. This makes it easy to find and to sell, especially if merchandise that is normally used together is placed together.
b. Always keep the stock neat and clean. It's almost impossible to find anything in a heap, and no one wants to buy a soiled or messy item.
c. In order to keep merchandise from getting shopworn, use the "first-in, first-out" system, being careful to place the newer goods under or behind the older merchandise.
d. Keep the stock on the sales floor filled in at all times. If a customer doesn't see an item, she may not ask for it either.

809.02.03 Insurance carriers including the one for your school district, unions, warehouse equipment manufacturers and warehouse management associations all can be good sources for safety signs and posters.

Number **Instructional Ideas** **Notes**

809.02.04 The definition of store control is "the process of checking the actual results against the plans and adjusting the plans accordingly." This is, of course, a constant process, and of all the sections involved in control, inventory control is the largest by far.

One way this objective might be reached would be to simply explain what inventory control is, and ask each student to try to write why each person might need to know the stock on hand. Let them guess, or talk among themselves for five minutes before suggesting they research it.

The reading involved in this area is very little, so a fifteen minute time limit would be appropriate. Then students could hand in papers and discuss this area or the teacher could talk briefly about the difference between dollar stock control and unit control.

809.02.05 Rules for taking a physical inventory are:

a. To be any good, it must be ACCURATE, COMPLETE, and NEAT.
b. For any fixture the counting is done from the top to the bottom and from the left to the right.
c. In a formal inventory, two people work together, one calling and one writing to increase accuracy.
d. The inventory team can double check themselves at the end of each fixture by the writer figuring the total number of items on that page and the caller counting the number of items in the fixture. If they agree, the sheet is probably correct. If they do not, it is necessary to start all over again.

809.02.06 The best way to teach this is to have students practice filling out the sheet, with the teacher or an experienced student acting as the caller and all students involved being writers. If a tape could be taken of the caller during an actual inventory, it would be even better.

With further practice and a little selling on the part of the teacher, it is possible to contract to have the DECA club take inventory for various local stores, giving the students real experience and making

Number	Instructional Ideas	Notes
809.02.06	(continued) money besides. If this is planned, try to get the exact inventory instructions for each store that will be inventoried and train students to be callers as well as writers.	
809.02.07	Have the students fill out the stock card, using an invoice or copy of an order to learn where each item of information originates. If there is a student store, use the store's stock cards for this. Actually, this whole unit can be used immediately by the student in a student store setting and, with that reinforcement under careful supervision, almost any student can become immediately employable and relatively easy to place in a training station.	

CASE PROBLEMS ON STORING & ARRANGING MERCHANDISE

1. Jerry works in the stockroom for Bilbous Botique. When he reported for work today, his instructions were to unpack a recent shipment of earthenware figurines, and place them with the rest of the goods in the line. Earthenware figurines are kept in the fifth shelf in aisle three. While reaching up to place the figurines on the shelf, he discovered a few dusty ones left from the last shipment. They looked pretty sad, so he carefully shoved them to the back of the shelf, putting the much better looking, new ones in front.

2. Bob and Bill were asked by the manager, Mr. Harhar, to bring some merchandise from the stockroom to the sales floor because they were nearly out of the special sale ties and customers were coming in asking for them. While loading the cart with merchandise, break time arrived so they took their break. After their break, when they were wheeling the cart onto the floor, a customer approached them and asked them what happened to all their special sale ties. Bill said he understood that they had been selling very fast, and may be out of stock. When the customer persisted and asked if there might not be more in the stockroom, Bill looked vague and said he really didn't know, but he didn't think so. The customer turned away, disappointed, and Bob asked Bill why he had said that. "Well", Bill said, "the ties are at the bottom of the things we are bringing down, and we couldn't very well drag them out right then, could we?"

3. Joe works as a stockman for Caswell's. He was almost through for the day when Mr. Broucher asked him to unpack a shipment of jeans, which came to 10 boxes. Joe opened all the boxes and pulled out all the jeans, looking for the invoice, which chose that particular day to be elusive. He had a royal mess -- all the jeans in a heap and empty boxes all over the floor, and no invoice, when the closing bell rang. Joe looked at the mess. It would take hours to straighten, IF the invoice could be found. Shrugging his shoulders, Joe took off his stock jacket and went home. He'd let the guys who came in the morning worry about it.

4. Tom had to put away an extra large shipment of widgets, which were going to be on sale next week. He sorted them neatly and began putting them into their usual place in the stockroom. Soon that shelf was filled, so he condensed the stock on the shelf below and filled that one too. Then he looked around the stockroom, and the place was full. "They buy too much stuff around here", he grumbled as he searched for more shelf space. And then he saw the hole. It wasn't very big, so he would have to roll the widgets very tightly to get them in, but finally, with a little shoving, all the left-over widgets were plugged into the space back in the corner, and Tom felt pretty good to have a neat stockroom again.

SAFETY RULES

1. Lifting
   - a. Get help if a load is too heavy or bulky to lift alone.
   - b. Get a firm balance by spreading your feet.
   - c. Keep feet as close to the object to be lifted as possible. Straddle it if you can.
   - d. Always squat to keep your back straight.
   - e. Get a good grip on opposite sides of the load. If it is really heavy, use opposite corners to aid in putting it down.
   - f. Push up with your legs.
   - g. Keep the load close to your body.
   - h. Reverse the process as you put it down, being careful not to squash your fingers.

2. Carrying
   - a. Be sure the way ahead is clear first, and that you can see over the load.
   - b. Be sure the load is not too heavy to carry the full distance.
   - c. Turn with your feet. DON'T twist your body.
   - d. Keep some space between your hands and doorways, etc.
   - e. Never run with a load.

3. Stacking
   - a. Keep the pile straight and even.
   - b. Set up and test a ladder before climbing. Face the ladder to climb. Use both hands. Stay on or below the 2nd rung from the top.
   - c. In raising a package over waist height, put it down at waist height, squat, and use your legs to lift.
   - d. Place any split or broken box on top of a pile and don't put anything on top of it.

4. General
   - a. Do not ever smoke in stock areas.
   - b. Pick up anything that falls on the floor immediately. Even a slip of paper can cause a fall.
   - c. Protect anything spilled on the floor by putting a chair or wastebasket over it until it can be mopped up.
   - d. In cutting open boxes, always cut away from yourself.
   - e. Keep drawers closed.
   - f. Never allow an electric cord to lay across an aisle or open floor area.
   - g. When setting down a box, be sure it's squarely on the table.
   - h. Use caution in going through doors; someone may be on the other side.

RETAIL SITUATIONS CASE PROBLEMS

1. It was a slow afternoon and Judi had volunteered to straighten the stockroom. She had finally gotten all the loose merchandise in neat piles on the lower shelves, all carefully arranged by classification and size, when she realized that the very large box over in the corner held the same merchandise. Obviously it should be placed right above the loose things. She tested the box, and while big, it didn't seem too heavy for her, but it would have to be moved from the top shelf on one side of the aisle to the next-to-the-top shelf across the aisle, which meant up the ladder, down the ladder, replace the ladder and go back up.

2. Sally had gotten one of those customers! She had gone through every pile of merchandise until the whole table was a mess and garments were all over the floor. And then she had opened every drawer and poked through it's contents, leaving the whole fixture looking like a cyclone had hit it. And she hadn't even bought anything!

3. The new shipment of sweaters had just been marked, and Mrs. Williams asked Joan to run up to the stockroom and bring as many as she could down. Joan found them easily, since they were all in boxes on the marking table, and she selected boxes of one of each size and color eagerly. There were 15 boxes, each 4" x 12" x 18", when she had finished making her selection, and two of them were split.

4. It had been a hectic afternoon in the basement stockroom, and when break time came, George decided he would just sneak a coke and a quick smoke in the corner rather than having to go all the way to the employees cafeteria on the top floor. He was sitting way back, leaning up against the wall when he saw Mr. Milhouse coming that way, and trying to get to his feet, he spilled his coke.

5. The stockmen were bringing out new merchandise, lots of it, and when they got to Martha's department they didn't take time to find an empty space to put down the heavy box of china but put it, instead, on the floor and dashed off. Martha knew she couldn't leave it there.

6. It was Saturday and there wasn't a stockman in the store when the shipment of advertised skirts finally arrived. Sandy would just have to try to unpack, mark, and get them on the floor herself.

7. The electricians had been there, and had pushed the cash register a long way away from the wall, so the cord would trip you. But it was a very heavy register and it sat on a large, heavy stand. Erin stood with a box of new merchandise she had been going to put out, wondering what to do.

8. Lunchtime! Wendell headed out of the swinging stockroom door with a suppressed whoop, almost running.

RETAIL INVENTORY SHEET

[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Total quantity ☐

1. Write C[illegible]
2. Do Not [illegible]
3. Do Not [illegible]
4. If an [illegible] Then Write [illegible]
5. [illegible]

[illegible] Enter [illegible] More Than [illegible]

WHEN IN DOUBT ASK QUESTIONS

STOCK CARD

Stock No. ____ Retail Price ____ Supplier ____________
Description Reorder Quantity ________
Reorder Point

DATE	UNIT COST	REC'D	SOLD	BALANCE	DATE INVENTORIED	COMMENTS

Stock No. ____ Retail Price ____ Supplier ____________
Description Reorder Quantity ________
Reorder Point

DATE	UNIT COST	REC'D	SOLD	BALANCE	DATE INVENTORIED	COMMENTS

(Note: stock cards should be prepared on 5" x 8" cards.)

Number	Condition	Performance	Standard
810.01.01	Given the list of Available Media, Strengths and Weaknesses	the student will list from memory the available media, strengths and weaknesses, listing ten media and one strength and one weakness for each	with 80% accuracy
810.01.02	Given information on the four main objectives of advertising and ten printed advertisements selected by the teacher to illustrate them	the student will recall and identify the correct objective for each advertisement	with eight out of ten correct
810.01.03	Given a list of the basic psychological wants and advertisements selected by the teacher to illustrate them	the student will match each want with the ads that illustrate it	with six out of eight correct
810.01.04	Given a list of secondary psychological wants/products	the student will match the products with the secondary psychological wants	with fifteen out of twenty correct
810.01.05	Given five examples of ad headlines	the student will identify each headline type	with 80% accuracy
810.01.06	Given instructions on the use of the six types of body copy and merchandise features of one product	the student will demonstrate the use of four of the types of body copy by writing the first three sentences for each	with three out of four correct
810.01.07	Given a list of advertising illustrations and seven advertisements containing illustrations	the student will match the illustration types with each advertisement	with six out of seven correct

Number	Condition	Performance	Standard
810.01.08	Given information on the four parts of logotype	the student will design and sketch a logotype for an imaginary business	including all four parts
810.01.09	Given ten ads	the student will identify the feature that gives some a feeling of exclusiveness and some a feeling of inexpensiveness	correctly
810.01.10	Given information on different types of borders and ten ads illustrating these borders	the student will match each ad with the correct border type	with complete accuracy
810.01.11	Given an Advertising Layout Rating Sheet, a merchandise illustration, and product facts for an item of merchandise	the student will write and plan the layout for a newspaper ad	receiving at least 70% on the Advertising Layout Rating Sheet

Number | Instructional Ideas | Notes

810.02.01 An acceptable definition of advertising is "any paid form of non-personal presentation and promotion of ideas, goods, or services by an identified sponsor."

The students should list all media from their own experience. Brainstorming would be a good tool to develop the media with their weaknesses and strengths.

810.02.02 The teacher should locate and show the students several ads for each advertising objective:
a. sell goods
b. sell ideas
c. sell services
d. create demands

To make a transparency from a magazine (glossy, colored) ad, take clear contact paper (shelf paper), cut to size and adhere it to the ad. Dip it in water with a little soap added. Practice and patience are needed, but these can turn out quite well.

810.02.03 The teacher can assign the students to bring to class an example of an ad for each psychological want. The ads can be presented to the class by the students with their analysis. The class can evaluate the student analysis. This can lead to good class discussion. The teacher should keep in mind that there may be disagreement on exactly which want is evidenced in an ad.

The teacher may wish to include some of the ads submitted by the student in his test ads. A list of psychological wants should include:
a. food and drink
b. shelter and comfort
c. sex
d. welfare of loved ones
e. freedom from fear
f. social approval
g. superiority
h. immortality

Number Instructional Ideas Notes

810.02.04 A list of secondary wants which are learned and conditioned by individual cultures should include:
a. bargains
b. information
c. cleanliness
d. efficiency
e. convenience
f. dependability and quality
g. style and beauty
h. curiosity
i. economy and profit
j. health
k. time saving
l. safety
m. imported or exclusive

810.02.05 The teacher can prepare examples for each type of headline. The different types of headlines include:
a. commands
b. exclamations
c. questions
d. superlative quality
e. statement of facts

The teacher can give each student or small group a product package and have him brainstorm a variety of headlines that could be used to advertise that product. The class can then discuss the different headlines developed and evaluate their attention getting power.

810.02.06 Body copy types are:
a. reason why
b. human interest
c. sense appeal
d. educational
e. jingles and rhymes
f. rebus (cartoon)

Number Instructional Ideas Notes

810.02.06 (continued)

Rebus body copy is not used often. Students can be encouraged to look up examples of the different types and if they find a rebus, give them extra credit.

The students should begin working in small groups to develop body copy. The group leader can present the result to the class for evaluation.

810.02.07 The teacher can have the students cut illustrations from trade magazines, consumer magazines, and newspapers and use the Advertising Illustrations form provided in this section:
a. creating a mood
b. showing product use
c. presenting customer benefits
d. brand name recognition

810.02.08 The definition of a logotype is a kind of trademark for a business that is recognized by the reading public which often includes:
a. business address
b. telephone number
c. business hours
d. company slogan

The teacher can compile a variety of trademarks which are known by most people and have each student identify the company or product involved. These are also available in retailing texts.

Discuss with the class the different locations where a logotype can be found.

810.02.09 The examples of white space in advertising should include some illustrating open space (blank space or unused space) to create an exclusive feeling, and some to illustrate crowded or little use of open space which creates a feeling of inexpensiveness.

Number	Instructional Ideas	Notes
810.02.10	The three types of borders which should be presented to the students are: a. distinct border (where ad is enclosed by a distinct frame) b. bleeding border (open and which extends off the edge of the page) c. understood (where picture or print leaves a white "understood" border without a line)	
810.02.11	There are advertising check sheets available which would provide the student with a step by step procedure to follow in preparing his advertisement.	
General:	A. Students who do well on the advertising competency should be encouraged to participate in the DECA advertising competition. B. Examples of advertisement layout and technical reproduction plates and mats could be supplied by your local newspaper for the bulletin board. C. Letters could be sent to various media asking their local rates. A student project could be designed from the results. D. Students can take a field trip to the local newspaper plant to observe how they develop an advertisement and prepare it for printing in the newspaper.	

AVAILABLE MEDIA STRENGTHS & WEAKNESSES

PRINTED MEDIA

STRENGTHS	WEAKNESSES
Newspaper	
Universal circulation	May be some waste circulation
Products can be illustrated	Often poor reproduction of illustration
Regularly used as shopping guide	
Magazines	
Long life of ad	High price
Seen by more readers	Long time between submitting the ad and reading of the ad
Good reproduction of illustration	
Direct Mail	
Uses color	May have high waste factor
Goes directly to prospect	Expensive for large mailings
Uses long messages with many illustrations	
Outdoor Advertising	
Impressive because of size	Expensive
Message repeated time after time	Not suited to direct selling
Permanence gives feeling of stability	No chance for real selling message
Bus & Taxi Cards	
Low cost	Not suited to direct selling
Offer color	Difficult to judge how many persons are seeing message
Well read; good repeat value	
Handbills	
Low cost	Heavy waste
Quick and easy to prepare	Distribution is expensive and uncertain
	Some resentment because discarded handbills clutter neighborhoods
	Local laws may prohibit handbills for this reason
Skywriting	
Creative art form with the right pilot	Cannot be done on windy days
Many urban areas	Expensive
Large readership	Polution
Large enough to read	Sore necks
	Car accidents on freeways

AVAILABLE MEDIA STRENGTHS & WEAKNESSES

ELECTRONIC MEDIA

STRENGTHS	WEAKNESSES
Television Offers color in many areas Product features can be demonstrated Uses motion and sound to attract attention	May be expensive Poorly handled message may annoy viewers Message may or may not reach product market
Radio Can stimulate excitement Almost 100% home saturation Allows last-minute changes in messages Personal approach through use of voice	Waste circulation No use of illustrations No knowledge of audience reached by message Poorly handled message may annoy listeners
Motion Pictures Captive audience Reach large audiences Use motion and sound to attract attention	People may resent message because they feel they are forced to watch

ADVERTISING ILLUSTRATION

TYPES OF ILLUSTRATIONS	TRADE MAGAZINES	CONSUMER MAGAZINES	NEWSPAPERS
SELECT A PRODUCT FOR EACH OF THE THREE MEDIA AND EXPLAIN			
1. Create a mood (product)			
What kind of mood?			
2. Product use (product)			
List the uses			
3. Benefits (products)			
List benefits			
4. Brand name recognition (product)			
How are you to remember the name?			

SECONDARY WANTS

Given a list of secondary wants which are learned and conditioned by individual cultures as:

(1) bargains,
(2) information,
(3) cleanliness,
(4) efficiency,
(5) convenience,
(6) dependability and quality,
(7) style, beauty,
(8) curiosity,
(9) economy and profit,
(10) healthfulness,
(11) time saving,
(12) safety,
(13) imported or exclusive.

Match the above wants by number with the following products (remember there can be more than one want for each product.)

1. Football____________________
2. Refrigerator____________________
3. Engagement Ring____________________
4. Bathing Suit____________________
5. Electric Shaver____________________
6. Radio____________________
7. Cosmetics____________________
8. Aspirin____________________
9. Electric Lawn Mower____________________
10. Light Bulbs____________________
11. Deodorant____________________
12. Local Cola____________________
13. Color Television____________________
14. Baby Stroller____________________
15. Life Insurance____________________
16. Tooth Paste____________________
17. Wax Paper____________________
18. Color Crayons____________________
19. Flare Pants (cuffs)____________________
20. Candy Bar____________________

Advertising: Layout Rating Sheet

Name________________________ Rated by____________________

Type of Advertising____________________ Date____________________

	Excel-lent	Good	Satis-factory	Fair	Poor	Score
1. NEATNESS	5	4	3	2	1	
2. ORIGINALITY OF APPROACH TO COMPLETE AD	5	4	3	2	1	
3. ARRANGEMENT OF COPY AND ART WORK (layout)	10	8	6	4	2	
4. IDEA IN HEADLINE	20	16	12	8	4	
5. EXACT DESCRIPTION OF MERCHANDISE	10	8	6	4	2	
6. USE OF SELLING POINTS IN COPY	20	16	12	8	4	
7. IDENTIFICATION OF ITEM IN ARTWORK	5	4	3	2	1	
8. SIGNATURE CUT	15	12	9	6	3	
9. LOCATION OF STORE	5	4	3	2	1	
10. STORE HOURS OR OTHER INFORMATION (lay-away, charge, etc.)	5	4	3	2	1	

Total possible points, 100 TOTAL, layout ______

DECA ADVERTISING — RATING

HIGH SCHOOL DIVISION

Ad Layout Rating Sheet

FACTOR	POSSIBLE POINTS	JUDGED POINTS
Neatness	5	
Originality of approach to complete ad	5	
Arrangement of Copy and Artwork (layout)	10	
Idea in Headline	20	
Exact description of merchandise	10	
Use of selling points in Copy	20	
Identification of Item in Artwork	5	
Signature cut	15	
Location of store	5	
Store hours or other information (lay-away, charge, etc.)	5	
TOTAL POINTS	100	

NOTE: The written portion of this Competitive Event will have 100 possible points. The test score will be added to the score received on the ad layout to determine the winner.

Number	Condition	Performance	Standard
811.01.01	Given the Basic Sales Techniques Study Guide	the student will complete the guide	with 90% accuracy
811.01.02	Given the Determining Customer Needs Chart & Information on the importance of knowing the basic needs and wants of a customer	the student will list the appropriate techniques to use in each situation	with five out of seven correct
811.01.03	Given seven types of customer personalities as follows: - unfriendly customer - undecided customer - deliberate customer - silent customer - "just looking" customer - foreign-language customer - gossipy customer	the student will list the ways to handle each	with five of seven correct
811.01.04	Given three sales dialogues	the student will identify which of the five buying decisions have been made by the customer at predetermined places in the dialogues	with 80% accuracy
811.01.05	Given a simulated sales situation	the student will list the buying signals given by the customer	with 80% accuracy
811.01.06	Given an identified product	the student will list at least ten questions the customer can ask about the merchandise when buying	with 100% accuracy
811.01.07	Given three sales case problems requiring the use of agreement sentences	the student will write an agreement sentences for each case	with two out of three satisfactory

Number	Condition	Performance	Standard
811.01.08	Given instruction on methods of overcoming objections and the Methods of Overcoming Objections Sheet	the student will write out (conversation form) a statement to illustrate the use of each method	with seven of the eight methods correctly used
811.01.09	Given a Customer Interview Sheet and a Sales Attitude Rating Sheet	the student will interview five customers leaving a store and complete the Sales Attitude Rating Sheet	to the teacher's satisfaction
811.01.10	Given a sales situation involving big-ticket merchandise of the student's choice, a Creative Sales Rating Sheet and a Customer Rating Sheet	the student will sell the merchandise to a customer selected by the teacher	with 80% on the rating form as determined by his peers and/or teacher

Number | Instructional Ideas | Notes

811.02.01 Some type of review should be conducted before the student attempts this objective. Showing a film or filmstrip could be incorporated in the review.

811.02.02 A list of possible techniques include:

a. Listen to her	She may tell you exactly what she wants. She may give hints about her problem. She may use expressions which will help you size up her needs.
b. Look at her	Study the clothes she wears. Study her manner.
c. Ask questions	"Is it for yourself?" "Where do you plan to use this?" "What colors do you now have?"
d. Show merchandise	Select a variety which you think suitable. Observe customer reaction.

The teacher may divide the class into groups and have them compile a list of techniques for determining customer needs and wants. A major list can then be compiled from which the student can complete the exercise.

811.02.04 Each of the sales situations can be numbered 1 through 5 at different places. The student then must decide just where the customer is in the decision process. The cases should include examples of an undecided customer, and a decided customer.

The five buying decisions are:
a. Why should I buy?
b. What style, brand or type should I buy?
c. Where should I buy?
d. How much should I buy?
e. When should I buy?

Number Instructional Ideas Notes

811.02.04 (continued)

The teacher should emphasize that every customer must make all five buying decisions on everything he buys although he is not completely aware of this process. Also, when the salesperson comes in contact with the customer, the salesperson must decide expertly where the customer is in the buying decision process before he can effectively sell.

811.02.05 Buying signals are indications from the customer (both verbal and physical) that he is favorable or unfavorable toward the merchandise, salesperson, or buying. Examples of buying signals include:

a. customer comments
  - "Can I get it delivered tomorrow?"
  - "I think it would look attractive in the living room."
  - "Where can I get parts for it?"
  - "I have a new purse that will match this dress perfectly."
b. facial expressions and posture (it is the change of expression or posture that is the buying signal)
  - animated face
  - thoughtful and serious
  - smile
c. customer actions
  - step back for a second look
  - scratch skin in contemplation
  - re-read label
  - demonstrate product to himself a second time

811.02.06 A list of questions a customer may ask about merchandise may include the following:

a. Will it wear?
b. Will it shrink?
c. Will it fade?
d. Will it hold its shape?
e. Will it look well on me?

Number	Instructional Ideas	Notes

811.02.06 (continued)

f. Is it in style?
g. Can it be altered?
h. Can it be washed?
i. Can it be repaired easily?
j. Is it true to size?
k. What is this material?
l. How do you care for it?
m. How does it work?
n. Who makes it?
o. Is it economical to use?
p. Is model A better than model B?

The teacher may use small group brainstorming to develop the list of questions a customer may ask about merchandise.

If the teacher wishes to carry this exercise one step further, he may have the students develop a list of information the salesperson needs to know in order to answer the customer's questions. Such a list might include:

a. materials of which product is made
b. how product is made
c. what can be expected of the product in use
d. how the product is used
e. how to take care of the product
f. appearance, type, and design of the product
g. history and background of the product
h. how the product compares with competing products
i. stock conditions

Number	Instructional Ideas	Notes

811.02.07 Of the many types of agreement sentence, the one which can be used by beginners most effectively is "From what you have said...this is what you want, isn't it?" The student fills in the middle with a summary of what the customer has said relating it to what the product will do.

811.02.08 The methods for overcoming objections include:

a. Yes,...but
b. Superior point
c. Boomerang
d. Explanation
e. Question
f. Direct denial
g. Demonstration
h. Third party

The Methods of Overcoming Objections sheet can be used for practice.

811.02.09 One method of pointing out changes in positive attitudes is to give the student a rating sheet on attitude the first of the period on Monday. Then spend the remainder of Monday and first half of Tuesday talking about enthusiasm and getting the students excited. The last half of the period on Tuesday, regive the same rating sheet, then pass back the first rating; have students make comparisons and discuss the differences in the two ratings.

The answers to the Sales Attitude Rating sheet are as follows:

1 - D
2 - D
3 - D
4 - A
5 - A
6 - A
7 - D
8 - A
9 - D
10 - A
11 - A
12 - A or U
13 - D
14 - D
15 - A
16 - D
17 - D
18 - A

Questions 8, 15, and 18 should be answered with an "A" for the student to achieve this objective. Questions 2 and 17 are the same and should have a "D" response.

Number | Instructional Ideas | Notes

811.02.10 The teacher should pick the customer for the sales situation. Equipment includes cash register with change, sales counter, checks, credit cards and machine, and saleschecks.

The student should be encouraged to select merchandise in which he is interested. A product information outline is a good idea to be sure the student knows what he is talking about.

The teacher may have students who are interested in sales careers do additional work on:

a. door to door retail selling
b. wholesale or manufacturing selling

In order to provide as much selling experience as possible a minimum time limit of 8-10 minutes should be set. Also, the student customer should have some knowledge of the merchandise -- so he has a definite need and develops some objections. A short rating sheet on the customer can be a means of motivating him to perform better (a customer rating sheet is included in this section). The rating sheet score can be used as a regular class assignment or for extra credit.

To break up the monotony of the sales demonstrations, different situations can be created such as:

a. have a second customer enter the sales demonstration and be looking around
b. have a husband and wife team play the part of the customer
c. have a second customer enter the sales demonstration and attempt to run down the merchandise
d. have a husband and wife team with one of them not wanting to buy the merchandise
e. have a husband and wife team who get into a family argument

Evaluation of these creative sales presentations should be by the teacher and only those students who are finishing this competency. If two or three sales presentations are going to be given on one day, local professional salesmen may be invited to participate in the evaluation process and to critique the presentations to the class.

Number	Instructional Ideas	Notes
811.02.10	(continued) It is important wherever possible that each sales presentation be videotaped so the student may have a chance to view himself. Before showing him the evaluations of others, you may want him to take a rating sheet and evaluate himself from the videotape playback.	

BASIC SALES TECHNIQUES STUDY GUIDE

Instructions: Complete each of the following as directed.

1. List the 5 steps of a sale in the order they occur.
   a.
   b.
   c.
   d.
   e.

2. Match column 2 with the statement in column 1. Column 2 may be used more than once. If column 1 is not a proper (correct) statement that a salesman should use, put a "O" in the blank.

Column 1

_____ a. "Many people feel it is fragile looking, but you go ahead and stand on it for your own assurance."
_____ b. "We have only 3 left..."
_____ c. "I am sorry, Mrs. Jones, we do not carry that brand, but we do have Brand X which we feel performs as well."
_____ d. "Good morning. May I help you?"
_____ e. "Which do you prefer, the red or the blue?"
_____ f. "Will there be anything else today?"
_____ g. "Thank you. Come again."
_____ h. "Good afternoon. These denim flares are our most popular selling slacks."
_____ i. "You have made a wise choice, Mr. Jones. The suit will wear well."
_____ j. "Do you want to buy these now?"
_____ k. "Would you like to look at a handbag to go with those shoes?"
_____ l. "Yes, they are delicate in appearance, but that is why they are so beautiful."
_____ m. "This tie goes very well with the shirt and we have them on special today only."
_____ n. "Good morning. I see you are looking at our dresses."
_____ o. "Crush the stuffed animal between your hands, Mrs. Jones...just fluff it gently and you restore it to its original condition."

Column 2

1. Merchandise approach
2. Buying motives
3. Customer benefits
4. Overcoming objections
5. Personal approach
6. Assuring customer satisfaction
7. Suggestion selling
8. Closing
9. Customer involvement
10. Sales features
11. Substitution selling

BASIC SALES TECHNIQUES STUDY GUIDE (continued)

_____ p. "Good day, Mr. Jones. I haven't seen you in some time."
_____ q. "No, they are very colorfast!"
_____ r. "We don't have that product in stock."
_____ s. "This electric knife comes with three different blades, one for cutting frozen foods, one for paring fruits, and the third for cutting meat."
_____ t. "Shall I charge this to your account?"
_____ u. "Be sure to stop by our cosmetic department. We are featuring a two-for-one sale. It is our way of saying 'thank you' to our customers."
_____ v. "And I know you would want your new baby to have all the protection possible."

3. Match the type of customer from column 2 with the method of handling him in column 1.

_____ a. Ask opinions -- show facts and figures
_____ b. Be patient -- use buying motives
_____ c. Hear customer out -- be positive
_____ d. Allow to browse until ready to buy
_____ e. Slow down -- explain details
_____ f. Lead him back using his own words
_____ g. Be patient -- use gestures, watch facial expression
_____ h. Use logic and present proven facts
_____ i. Work on creating goodwill
_____ j. Ask questions to get responses

1. Deliberate customer
2. "Just looking" customer
3. Undecided customer
4. Unfriendly customer
5. Silent customer
6. Foreign-language customer
7. Gossipy customer

4. After each customer statement, write in the buying decision already made by the customer.
a. "I'll take 2 pair of the red pajamas."
b. "I am not sure whether the Zenith will be good enough for me."
c. "I'm just looking, thank you."
d. "Can you have the stereo delivered tomorrow?"
e. "I am interested in a warm coat."
f. "Do you have any more slats like those I purchased here last month?"

DETERMINING CUSTOMER NEEDS CHART

Instructions: List the appropriate techniques you need to use in determining customer need for each of the following situations.

1. The customer is interested in a gift.
2. The customer is looking at women's dresses.
3. The customer is a teenage boy whose girlfriend's birthday is tomorrow.
4. The customer is very undecided about a distant cousin's 50th wedding anniversary.
5. The customer says she wants a blouse, but keeps talking about the fight she had with her husband this morning.
6. The customer is a gentleman in the lingerie department.
7. A mother and teenage daughter in teen dress shop. (List techniques for each.)

METHODS OF OVERCOMING OBJECTIONS

Instructions: For each objection below, identify all the methods for effectively overcoming the objection and then write out (conversation form) how you would overcome the objection. Don't use any one method more than twice.

Objection	Methods of Overcoming	How you would overcome objections
1. "I'll have to talk it over with my husband."		
2. "I never heard of this brand."		
3. "That's more than I want to pay."		
4. "This is a poor quality of material."		
5. "I can get it for less at ________."		
6. "I'll look around first."		
7. "The price is too high."		
8. "I'm afraid it won't hold up."		
9. "You don't deliver on time."		
10. "I don't know my wife's size."		
11. "But you charge for delivery."		
12. "But it is so light." (blanket)		
13. "I don't have time now."		

CUSTOMER INTERVIEW SHEET

Look for people with shopping bags. Approach them and say something like "I see you purchased something today. May I ask you a few questions about your purchase?"

	Interview 1	Interview 2	Interview 3	Interview 4	Interview 5
1. What type of merchandise did you purchase?					
2. What benefits do you hope to realize from this purchase?					
3. What personal satisfaction do you hope to realize from this sales transaction?					
4. In what ways did the salesperson help you make your purchase?					
5. Could you have arrived at a decision without the help of the salesperson?					

SALES ATTITUDE RATING SHEET

Given below are two sets of questions. Consider each question carefully and answer it as frankly and honestly as you possibly can. There are no right or wrong answers as such. It is not expected that your feelings should be like those of anyone else. There are three ways to mark the rating sheet:

_A_ means that you agree with the statement made.
_B_ means that you disagree with the statement made.
_C_ means that you are uncertain about your feelings regarding the statement made.

___ 1. The salesperson's salary is an unnecessary expense the customer must assume.
___ 2. Most customers would rather buy from a self-service operation than from retail sales personnel in a store.
___ 3. Most business transactions can be achieved without the help of a salesperson.
___ 4. Customer satisfaction is provided by the salesperson familiarizing the customer with the advantages, features and benefits of a product.
___ 5. People purchase products to improve their physical well-being.
___ 6. Sales presentations provide ideas, good feelings, self-respect, and happiness for customers.
___ 7. Most customers consider the sales presentation a complete waste of time.
___ 8. The sales presentation helps the customer obtain personal satisfaction for the money he spends for a product.
___ 9. The pressures brought to bear by the sales presentation become an unfair psychological motivation to buy for the customer.
___ 10. The sales presentation provides reassurance to the customer that buying the specific product at that specific time and place was a good decision.
___ 11. You should enjoy selling the merchandise or service with which you work.
___ 12. You do not need to spend time getting better acquainted with your firm's business policies.
___ 13. There is no relationship between selling and the merchandise featured in window and/or interior displays.
___ 14. Suggestion selling benefits the store more than it does the customer.
___ 15. Selling is important to any store's operation.
___ 16. Most businesses fail because of the sales costs they must bear.
___ 17. Most customers would rather serve themselves than be served by a retail store clerk.
___ 18. Selling is important to the total economic well-being of a business.

CREATIVE SALES RATING SHEET

Sales Person ______________________ Rater ______________________

Prospect ______________________ **Product or Service** ______________________

Directions to rater: Check squares that best describe the salesman's performance.

					EXPLAIN OR GIVE EXAMPLE
1. Type of approach used by sales person					
☐ 0 None		☐ 5 Greeting or Service		☐ 10 Personal greeting or Merchandise	
2. Did he find out what the prospect wanted?					
☐ 0 None	☐ 3 Tried & failed	☐ 5 No need to do so	☐ 8 Yes, satisfactorily	☐ 10 Yes, outstandingly	
3. Did he link product information to the prospects wants?					
☐ 0 None		☐ 5 No need to do so		☐ 10 Yes, outstandingly	
4. Did he use selling points?					
☐ 0 None	☐ 3 Weak selling points	☐ 5 No selling pts. needed	☐ 8 Yes, satisfactorily	☐ 10 Yes, outstandingly	
5. Did he use demonstration, comparisons, testimonials, explanations, and such?					
☐ 0 None	☐ 3 Tried; was ineffective	☐ 5 No need for them	☐ 8 Yes, reasonably well	☐ 10 Yes, outstandingly	
6. Did he use agreement sentences?					
☐ 0 None	☐ 3 Used poorly	☐ 5 Tried to use a couple	☐ 8 Used satisfactorily	☐ 10 Used several very well	
7. Did he meet the prospect's objections?					
☐ 0 No	☐ 3 Unconvincingly	☐ 5 No objections offered	☐ 8 Satisfactorily	☐ 10 Convincingly	

CREATIVE SALES RATING SHEET (continued)

8. Did he take advantage of any customer buying signals?					EXPLAIN OR GIVE EXAMPLE
☐ 0	☐ 3	☐ 5	☐ 8	☐ 10	
Missed buying signal	Recog. signal; did not use	No buying signals offered	Recog. signals; used little	Recognized & used signals	
9. Were his closing efforts effective?					
☐ 0	☐ 3	☐ 5	☐ 8	☐ 10	
No attempt to close	Not effective	No need to close	Yes, satisfactorily	Yes, outstandingly	
10. Did he promote the sale of additional goods or services?					
☐ 0	☐ 3	☐ 5	☐ 8	☐ 10	
No	Tried & failed	Used question to suggest	Yes, adequately but timing off	Yes, outstandingly	
11. Did he insure customer satisfaction?					
☐ 0	☐ 3	☐ 5	☐ 8	☐ 10	
No	Tried & failed	Only thanked customer	Yes, adequately	Yes, outstandingly	
12. How well did he know his product?					
☐ 0		☐ 5		☐ 10	
Used little product knowledge		Used fair amount of product knowledge		Good use of product knowledge	
13. What was his personal effect on prospect?					
☐ 0	☐ 3	☐ 5	☐ 8	☐ 10	
Antagonizing	Negative	Neutral	Favorable	Extremely favorable	
14. How was his dress and grooming?					
☐ 0		☐ 5		☐ 10	
Unsatisfactory		Satisfactory		Outstanding	
15. Salesman's selling attitude					
☐ 0	☐ 3	☐ 5	☐ 8	☐ 10	
Acted bored	Unfavorable	Neutral	Favorable	Showed outstanding enthusiasm	

GENERAL COMMENTS: ______________________________

TOTAL SCORE: ☐

CUSTOMER RATING SHEET

Customer____________________ Rater____________________

Salesperson____________________ Product or Service____________________

1. Allowed the salesperson to determine need.

			EXPLAIN OR GIVE EXAMPLE
__/ 0 No	__/ 5 Partially	__/ 10 Yes	

2. Amount of product knowledge required of salesperson.

__/ 0 None	__/ 5 Some	__/ 10 Very much	

3. Objections raised.

__/ 0 None	__/ 3 One	__/ 5 Two	__/ 8 Three	__/ 10 Four	

4. Buying signals given.

__/ 0 None	__/ 5 One	__/ 8 Two	__/ 10 Three	

5. Allowed salesperson to close sale.

__/ 0 No	__/ 5 Only partially	__/ 10 Very definitely	

6. Difficulty of customer.

__/ 0 Easy	__/ 5 Fairly difficult	__/ 10 Very difficult	

GENERAL COMMENTS:____

____

____

TOTAL SCORE ☐

Number	Condition	Performance	Standard
812.01.01	Given information on display objectives	the student will recall and write all objectives including the subpoints	with 5 out of 7 correct
812.01.02	Given Display Survey Sheet and a written test	the student will observe for 5 minutes people passing by each of 4 displays (window and interior) and complete a written test on their observations	with 80% accuracy
812.01.03	Given instructions on the color wheel and color schemes and the Color Coordinates Sheet	the student will complete the color wheel and questions on color coordinates	with 8 out of 9 correct
812.01.04	Given information on the principles of design and the Line and Design Blank	the student will draw illustrations of the 5 principles and 7 elements of design	with 10 out of 12 correct
812.01.05	Given 15 slides of different types of display (interior and window)	the student will identify each type of display in writing	with 13 out of 15 correct
812.01.06	Given Planning a Display Guide and Display Rating Sheet	the student will plan, sketch, and arrange a display	with a 75% rating on the Display Rating Sheet as determined by peers and/or teacher

Number | Instructional Ideas | Notes

812.02.01 The concepts of institutional and promotional were presented in the Sales Promotion Competency. The teacher may want to review these with the students.

Display can be defined as any form of nonpersonal presentation of goods or ideas to a group.

Sears has a monthly magazine, Spotlight, with handsome colored pictures of displays. Often you can borrow copies (though seldom get them to keep).

Use Objectives of Display form and have students go into the community to locate and identify illustrations of objectives.

812.02.02 The Objectives of Display and Display Survey forms are designed to be given to the student at the same time so that one trip to a store can cover both.

The test can be a series of 10 questions in which the student presents the results of his survey and draws some conclusions.

812.02.03 The Color Coordinates Form is a color feelings information sheet which can be discussed with the students. The teacher can have the student identify a product for each color and explain why the color was selected by the manufacturer.

Another technique is to have the student survey packages in supermarkets for the colors used.

Most students have little exposure to the use of a color wheel. They should be expected to memorize it and be able to explain the achromatic colors, black and white.

The teacher can have the student use pastel chalk on a sheet of paper to demonstrate making secondary colors, monochromatic color schemes, and tints, shades, tones, and intensity.

Number Instructional Ideas Notes

812.02.04 The teacher may wish to use a flannel board and lines, circles, squares, rectangles, and triangles made from flannel or construction paper with flannel pasted to the back.

To give each student practice, have him take a 12" x 18" piece of paper and a variety of shapes cut from construction paper, placing the shapes on the paper to form designs. If the teacher walks around viewing these arrangements, he can evaluate them without requiring pasting.

812.02.05 It is quite easy for the teacher to take a slide camera into the community and take slides of the different types of displays for the students to identify.

If slides are not available, the student's knowledge may be tested through the identification of pictures of displays cut from trade magazines or through written matching exercises.

For the student to develop a concept of each type of display, he could be assigned the task of identifying the different types of display in different stores in the community. A possible list to give him could include:

a. window displays
   - full background
   - partial background
   - open background
b. interior displays
   - open
   - closed
   - platform
   - shadow box
   - ledge
   - counter
   - architectural

Number | Instructional Ideas | Notes

812.02.06 The Calendar of Merchandising Dates Form was included to help the student tie in seasonal or community events to his display.

The teacher has a choice of 3 ways of getting the student to prepare his display, window or interior:

a. In class, displays can be done using an enclosed window (preferably facing outside) or just a platform or table will do for an interior display. The student can decide on his display and make contact with a business in the community to borrow merchandise. If this is the method you follow, the teacher will need to develop a form letter to the merchant which the student takes with him. Request that the merchandise be loaned for a 1- or 2-week period. The show card should show who donated the merchandise. A picture of the display presented to the businessman can do much for good public relations.

b. In many schools the teacher has access to displays in the business community. The student can be assigned a store and type of displays to design and build. He can get help from the businessman as he completes the display. The show card should identify that the display was completed by __________ and he is a student at __________ High School.

c. The least desirable method is a diorama. The student takes a cardboard box and cuts merchandise pictures from magazines to arrange to make a miniature window display.

Evaluation of the displays may be done by the teacher and students. If possible, have several businessmen also complete an evaluation on it.

The teacher should place great emphasis on the planning stage of the display. Most students skip this part and want to do just the display. Some type of a checklist can be provided which serves as a guide the students must follow.

Number	Instructional Ideas	Notes
General:	A. Overhead transparencies can be an effective visual tool for presenting many display techniques. B. A display person could come into the class with props and set up a small display with the students' help. The display person could also bring in a display calendar to show past, present, and future events and how they fit into community events. C. A person from the grocery field could talk to the class about the importance of POP (point of purchase) displays and who makes them. D. On color, the students could check the color schemes of their house or friends' houses. Students could come to class in different color schemes. E. Another interesting project can be the "living mannikin." Students could stand on a platform inside the store or in an exterior window display. They would find display clothes in the store and stand motionless for only 15 to 20 minutes. The students can rotate through the project involving a whole class. F. Students could set up displays around school for the homemaking, industrial arts, and the art departments. Displays could also be set up in merchants' windows (possible money-maker for DECA). Students who do well could be encouraged to enter the DECA Display Contest.	

OBJECTIVES OF DISPLAY

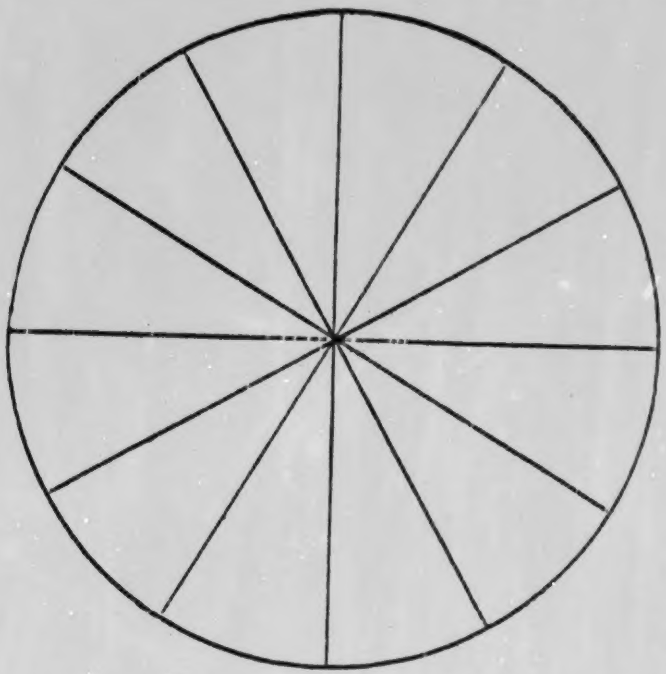
Locate and explain a window or interior display for each type	Store Name	Merchandise	Explain in your opinion how the merchandise carries the theme and the promotional type
A. Sell goods			
B. Give information to the customer			
1. Show new merchandise			
2. Introduce new uses of merchandise			
3. Show proper care of merchandise			
4. Suggest merchandise combinations			
C. Build goodwill and prestige for the store			

DISPLAY SURVEY

Observe people walking by displays who:	Number of people	%	Number of people	%	Number of people	%	Number of people	%
A. Don't see the window								
B. Glance at the display (attention)								
C. Stop and look (interest)								
D. Step closer or touch (desire)								
E. Go into the department or store (action)								
Totals								

COLOR COORDINATES

1. Using the wheel below and crayons, make a color wheel and answer the questions under it.



2. Primary colors are: ____________________

3. Secondary colors are: ____________________

4. Tertiary (intermediate) colors are: __________
____

5. A monochromatic color scheme of yellow is: ________
____

6. An analogous color scheme of green is: __________
____

7. A complementary color scheme of blue is: ________
____

8. A split complementary color scheme of purple (violet) is: ____________________

9. A triadic color scheme of orange is: __________

Sketch:
Part 1--Element of Design

LINE AND DESIGN

1. Repetition (exact)

2. Repetition (alternation)

3. Repetition (progression)

4. Texture

5. Harmony

Part 2--Principle of Design

6. Dominance

Part 2--Principle of Design (continued)

LINE AND DESIGN (continued)

7. Balance (formal)

8. Balance (Informal)

9. Balance (visual)

10. Proportion

11. Unity

12. Contrast

PLANNING A DISPLAY

Answer the following and then make sketch:

What is(are) the

A. Purpose

B. Event (seasonal or community)

C. Theme

D. Merchandise

E. Props

F. Lighting

G. Show cards and price tags

H. Merchandise accessories

I. Background materials

J. Floor covering

PRELIMINARY SKETCH

DISPLAY RATING SHEET

Name and location of display______________________________

Name of person checking display____________________ Date________

Theme____

	Excellent (4Pts.)	Good (3 Pts.)	Satisfactory (2 Pts.)	Fair (1 Pt.)	Poor (0 Pt.)
1. Cleanliness					
2. Background					
3. Size in proportion to display					
4. Appropriateness of merchandise					
5. Attention value of display					
6. Simplicity of design					
7. Timeliness of display					
8. Originality					
9. Use of showcards or signs					
10. Color harmony					
11. Lighting					
12. Arrangement (balance)					

TOTAL POINTS________ (45-48, Excellent; 40-44, Good, 35-39, Satisfactory; 25-34, Fair)

Additional Comments:

COLOR FEELINGS

Color feelings: People react to different colors in different ways, and while we are not all alike in our reactions to colors, some of our feelings about them are pretty universally held. For instance:

1. Red:
   a. Strong, strong emotions, physical strength, anger, courage
   b. Most visible, used to indicate danger (stop signs)
   c. Christmas, Valentines, otherwise best as an accent
2. Blue:
   a. Peaceful, suggests distance, air, water, sadness, sincerity
   b. Gives a pleasant, calm feeling. Called "everyone's favorite color."
3. Yellow:
   a. Cheerful, happy, suggests sunshine and life, honor, loyalty
   b. Stands out more clearly against dark background than any other color, so most effective when lighting is poor
   c. Very stimulating, can be tiring if overused
   d. Typical uses for Spring, Easter, children's displays
4. Orange:
   a. Warm, suggests vitality, endurance, harvest time, Halloween
   b. Very appetizing color, can make food and interiors appealing
   c. Best used in small quantities
5. Green:
   a. Calm, fresh color. Suggests nature, youth, and hope.
   b. Relaxing to look at, makes small area look larger
   c. Yellow-green is more cheerful, blue-green more relaxing
6. Purple:
   a. Deep, rich color. Suggests royalty, seriousness, suffering.
   b. Has dull quality, limited in use for backgrounds, but can give a very dramatic or rich effect
7. White:
   a. Suggests purity, can be cold color, suggesting snow
   b. Neutral color, can be used to soften a too bright display
8. Black:
   a. Suggests death, sorrow. Can be rich or dull.
   b. A little can soften a too bright display, much can be very dramatic
9. Brown:
   a. Earth color. Warm, comfortable. No symbolism attached to it.
   b. Good background color to soften too bright display

COLOR FEELINGS (continued)

10. Warm colors:
    - a. Red, yellow, orange, and bright colors
    - b. Give feeling of heat, light
    - c. Make objects look larger than they are, so called advancing
11. Cool colors:
    - a. Blue, green, violet, and dark colors
    - b. Give feeling of coolness, shade
    - c. Make objects look smaller, so called receding colors

CALENDAR OF MERCHANDISING DATES

Date	Event	Colors	Emblems
January 1	New Year's	Apple green and white	Father Time, baby, hourglass
February 12	Lincloln's Birthday	Red, white and blue	Shield, flags, portraits
February 14	Valentine's Day	Red and white	Hearts, cupids, arrows
February 22	Washington's Birthday	Red, white and blue	Pageants, cherries, hatchets
March 17	St. Patrick's Day	Green	Irish flag, shamrocks, Irish emblems
March 21	First day of spring	Coral, apple green	Birds, flowers, butterflies
Date varies	Easter	Violet and white Purple and white	Chickens, rabbits, flowers, birds, butterflies
April 1	April Fool's Day	Yellow and red Yellow and blue	Jester, fool's caps, bells
April 26	Confederate Memorial Day	Red, white and blue	Wreaths, flowers
May 1	May Day	Any pastel shades	May baskets, Maypole
Date varies	Mother's Day	Red and white	Carnations
May 30	Memorial Day	Red, white and blue	Flags, wreaths
June	Bridal Season	White and Nile green	Bells, rings, confetti, bride and groom
Date varies	Father's Day	Any strong, bright colors	Picture of father
June 14	Flag Day	Red, white and blue	Flags
June 21	First day of summer	Any pastel rainbow shade	Birds, flowers, butterflies
June	Graduation	School or college	Diploma, cap, and gown, books, owl
July 4	Independence Day	Red, white and blue	Flags, shields, firecrackers
July	Vacation	Cool pastel shades	Baggage, seashore, parasols, beach scenes
First Monday in September	Labor Day	Red, white and blue	Various artisans' tools
September	School opening	School colors or fall colors	Blackboard, slate, books
September 21	Autumn	Reds, brown, yellows	Autumn leaves, chrysanthemums
October 12	Columbus Day	Red, white, blue---combined, if desired, with green, red and white (Italian colors)	Ships
October 31	Halloween	Orange, black	Witches, cats, bats, owls
November 11	Veteran's Day	Red, white and blue	Flags of Allies, poppies
Last Thursday in November	Thanksgiving	Red, burnt russet, orange, light orange	Turkeys, horn of plenty
December 21	First day of winter	White	Icicles, snow-covered branches
December 25	Christmas Day	Red and green	Santa Claus, holly, bells, candles

900. DISTRIBUTIVE OCCUPATIONS

Competency Modules

901. Checker-Cashier-Bagger
902. Salesperson, General
903. Service Station Attendant
904. Waiter-Waitress

Number	Condition	Performance	Standard
901.01.01	Given the Checker-Cashier-Bagger Job Duties List	the student will: a. list five normal arrival procedures and allot time needed for each	with 100% accuracy and at least five minutes allotted
		b. describe five duties of the checker-cashier and five duties of the bagger	with 80% accuracy
901.01.02	Given a list of twenty merchandise items	the student will identify those that are subject to California Sales Tax	with 90% accuracy
901.01.03	Given a layout diagram for a supermarket and a self-service store	the student will select five departments in each and explain the reasons for their location in the store layout	with 80% accuracy
901.01.04	Given the principles of price-marking merchandise	the student will: a. price-mark twenty cans, bottles and boxes	accurately
		b. demonstrate how cartons should be opened for price-marking	using proper methods
901.01.05	Given twenty-five grocery items on a table or stand, a selection of paper bags and a Bagging Check Sheet	the student will bag the items	correctly in two minutes with complete accuracy
901.01.06	Given a produce scale and twenty items to weigh, the price per pound for each item and a cash register	the student will: a. adjust scale for accurate weighing b. weigh and compute the total price c. ring up each item on the cash register	with 100% accuracy in five minutes

Number	Condition	Performance	Standard
901.01.07	Given a grocery basket containing twenty-five grocery items, a customer, a cash register, a scale, and a Checking Out Merchandise Check Sheet	the student will: a. greet the customer b. ring up the items c. figure sales tax d. make change	in three minutes with 100% accuracy on the sale total and check sheet

Number Instructional Ideas Notes

901.02.01 In most of this competency, reference will be made to the checker and the supermarket because it is easier to obtain materials for training. Also there is a greater degree of skill involved in this area.

A number of worksheets can be made up for the students to practice on after the sales taxable items have been discussed.

A list of taxable and non-taxable items is available from the local Board of Equalization office along with the sales tax laws.

901.02.02 Have the students visit several department stores and supermarkets and sketch the different layouts. Use these as a basis for class discussion on the importance of locating different departments in the store.

This is also a good time to point out that each cashier and checker should be completely familiar with all merchandise locations in his store.

901.02.03 The students may be grouped to conduct the survey and then report their findings to the class.

Several types of price-markers should be available for the students to use along with a variety of merchandise on which they can practice.

The principles of price-marking should include:
a. What happens if items are not marked legibly?
b. The various types of marking machines in use in department stores and supermarkets.
c. The proper and most efficient methods for marking opened cartons containing one and more than one layer.
d. The ways different types of cartons may be opened to better expose the items for marking.
e. The importance of not damaging the merchandise when opening cartons.

Number	Instructional Ideas	Notes

901.02.03 (continued)

Boxes may be brought to class and students can demonstrate opening them by using a pencil and drawing lines where they should be cut.

901.02.04 Bagging should be taught utilizing four steps. Begin by having the students read about how items should be placed, then demonstrate for them the proper procedures to follow; have students practice until they can do it correctly. Finally, have them practice with the two minute time limit.

Good bagging procedures:
a. Familiarize yourself with the size bags in your store.
b. Use the smallest bag and the least number that will carry the order.
c. Lay a solid base with cans and heavy items.
d. Build up the sides with broad cartons and fit edges into corners.
e. Place bottles in the center to prevent breakage.
f. Pre-wrap or pre-bag the "wets."
g. Put the perishables on top.
h. Don't mix odoriferous items; small bag them.
i. Pack items like ammonia separately.
j. Make sure the bag won't tip over in the car.

Safeway's qualifying standard for Bagger is to bag six baskets of produce, meats, and groceries with 25 items in each in a total of twelve minutes.

901.02.05 Items for practice weighing can be made from different length 2' x 4's wrapped in butcher paper or from a mixture of cans and bottles partially filled with sand to give a variety of weights. Worksheets utilizing different prices per pound allow a small number of items to be weighed many times giving the student good practice.

Number | Instructional Ideas | Notes

901.02.06 The cash register should be taught in five steps:

a. fingering techniques
b. departmental registration
c. practice for skill development from worksheets
d. grocery baskets of merchandise for practice
e. three minute timings on grocery carts containing 25 items

The test basket of grocery items should contain the following:

a. canned goods
b. bottled goods
c. boxed goods
d. liquor
e. bleach/soap
f. meat
g. sacks of produce (filled with sand for weight)
h. bread
i. dairy products
j. miscellaneous--cosmetics, toiletries

It is possible to combine the testing of bagging and the cash register by having a customer with a grocery basket, a bagger, and a checker at one station. Start the bagger one minute after the checker, thus both should finish at the same time. This creates a very realistic situation. The customer should be encouraged to carry on a small conversation with both the checker and bagger.

Safeway's qualifying standard for Checker-Cashier operation speed is: ring up six baskets of produce, meats, and groceries with 25 items in each basket, no bagging, and make change in a total of 18 minutes with 100% accuracy.

General: A. Additional things which the teacher may wish to cover in this occupation are: Credit Summary Refund Sheet, Checker's Summary Sheet (Departmental Voids, Coupons, and Bottle Returns), front-end operation procedures, handling coupons, food stamps, pilferage.

Number Instructional Ideas Notes

General: (continued)

B. The following are a number of checker-cashier situations which can be used in the classroom to stimulate discussion.

- The items you have checked are: $1.00 grocery
  2.98 produce
  3.10 meat

  You press the wrong key on the register and ring 10¢ instead of $1.00. What would you do?

- You have completed ringing the customer's order. The customer tells you that you rang the wrong amount for an item. What would you do?

- You have almost completed ringing an order. The customer tells you that she has changed her mind and does not want an item that you have already checked. What would you do?

- An item is illegibly marked. You do not know the correct price of the item. What would you do?

- A customer is waiting in line to check out. You see her open a package of cupcakes. She feeds one cupcake to her child and eats the other. When it is her turn to check out, she doesn't mention the cupcakes. You do not see the empty wrappings. What would you do?

- As a customer is leaving your checkstand, she slips on a piece of lettuce that is on the floor. She appears to be badly hurt. What would you do?

Number | Instructional Ideas | Notes

General: B. (continued)

- It is almost closing time. Few customers are in the store. A man comes to your checkstand with his order. As you start to check the items, he says: "I've got a gun. This is a stick-up. Put all the money from the drawer into a paper bag. Do it quickly and quietly or I'll shoot." What would you do?

- You just counted back the change to the customer. The customer looks at the change and says, "You gave me change for $5.00; I gave you $10.00." What would you do?

- The customer's bill is $14.26. The customer tells you that she does not have enough money to pay for the order. What would you do?

- The customer is waiting for change. You need four $1.00 bills for the change. You have only three $1.00 bills in the cash drawer. You do have a dollar bill in your pocket that belongs to you. What would you do?

- The customer's bill is $3.75. She gives you a $100.00 bill in payment. What would you do?

- A customer gives you a $20.00 bill in payment. The bill looks counterfeit to you. What would you do?

- You are bagging an order. The next customer in line is placing her order on the checkstand. She drops a bottle of hand lotion. The bottle breaks and the hand lotion splashes on the clothes of the customer you are waiting on. What would you do?

- A customer complains to you that the melon she purchased on the previous day was spoiled. Since the odor of the melon was very bad, the customer claims she threw it out. She requests that you refund the money that she paid for the melon. What would you do?

Number Instructional Ideas Notes

General: B. (continued)

- The order you are checking contains an unmarked bag of 10 oranges. You consult the daily produce price list on the register and discover that three types of oranges are listed: Valencia oranges @ 12 for 69¢; Navel oranges @ 5 for 49¢; and Jaffa oranges @ 6 for 59¢. You don't know one orange from another. What would you do?

JOB DUTIES LIST

Checker-Cashier

Uses cash register to record sales. Receives money from customers in payment for goods sold. Counts money to verify amount received. Issues change and receipts for goods sold. Tallies money in the register at the end of the working day. May wrap or bag goods.

A cashier is a person who works the checkout counter in a self-service nonfood store.

A checker is a person who works the checkout counter in a supermarket/self-service grocery store.

Bagger

Primary function is to bag, wrap, or package goods in a self-service store. May carry out merchandise for customer. Responsible for maintaining a clean work area and supply of bags.

Arrival Procedures

1. Record time of arrival, lunch break, and departure.
2. Place personal property in designated area.
3. Read notices and bulletin board (note sale items, ads, special events, policy, etc.).
4. Check personal appearance.
5. Prepare work area (dust, straighten, clean up).
6. Obtain supplies needed (salesbooks, pencils, bags, etc.).

Checker-Cashier Duties

1. Set up and operate cash register.
   a. Get change fund and count to verify
   b. Face bills and place change in till
   c. Record sales and voids as required
   d. Remove change at end of day, count and record
   e. Take change to office
2. Place merchandise on counter--arrange items according to store policy. Be careful of easily damaged items.
3. Ring up order.
   a. State out loud the amount of each item
   b. Punch amount of each item into the cash register
   c. Subtotal taxables
   d. Add
   e. Total order
   f. State out loud the total amount of the order
   g. Follow proper change making procedures
   h. If used, give premium stamps to customer
   i. Thank customer

JOB DUTIES LIST (continued)

4. Report any improper markings or illegible stampings on merchandise.
5. Complete saleschecks if necessary.
    a. Write legibly or print
    b. Use charge plate or verify name and address
    c. List and verify merchandise, units, prices and total
    d. Void as necessary, using company procedure
    e. Verify credit according to company policy
6. Wrap or bag merchandise when baggers not available.
    a. Ring sale before bagging
    b. Select proper size bag or paper
    c. Bag neatly and securely
    d. Gift wrap if requested and if can do so
7. Make refunds and exchanges.
    a. Prepare proper forms
    b. Follow store policy on time limits
    c. Maintain customer's goodwill
    d. Get authorization
    e. Offer suitable substitute
8. Adjust complaints or refer them to proper authority.
9. Answer phone and intercom.
    a. Excuse self from customer
    b. Answer promptly and pleasantly
    c. Identify department or store and self
    d. Write down information and read back to verify
    e. Offer assistance if person asked for is not available
    f. Say a pleasant goodbye and hang up gently
10. Change tape in cash register when necessary.

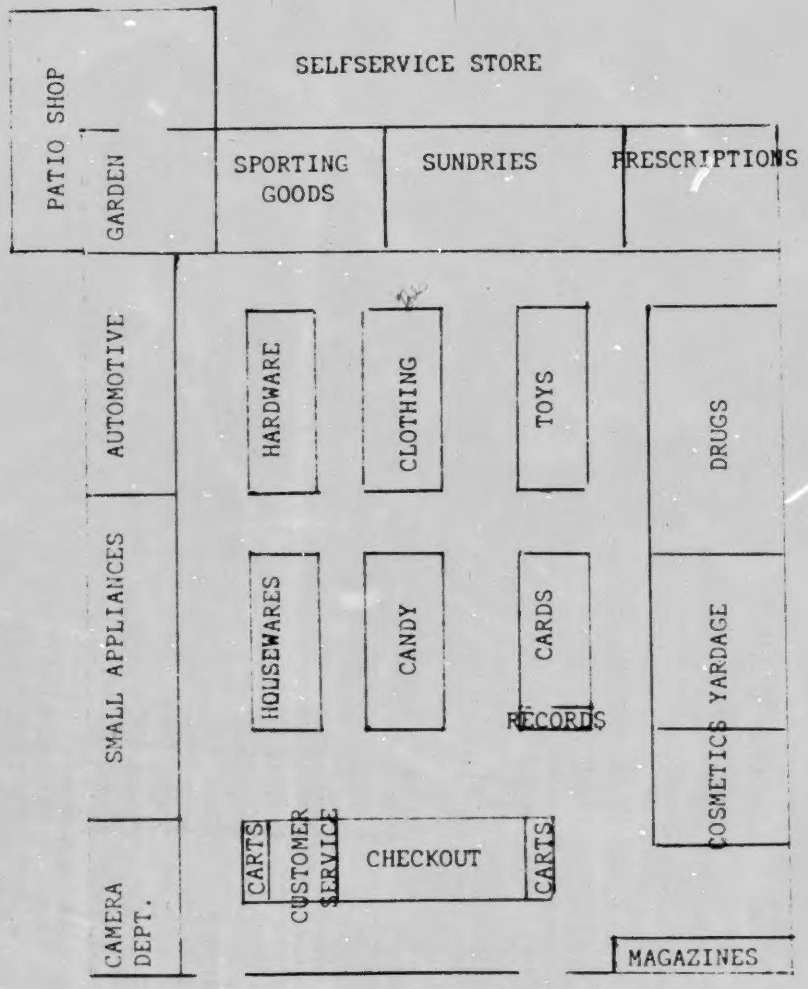
Bagger Duties

1. Bag merchandise correctly.
2. Carry out merchandise.
3. Put empty bottles into proper racks.
4. Maintain a clean checkout area.
5. Keep parking area clean.
6. Assist the checker-cashier whenever necessary.
7. Assist the customer courteously.
8. Return and pick up merchandise for customers.
9. Return merchandise carts to store.

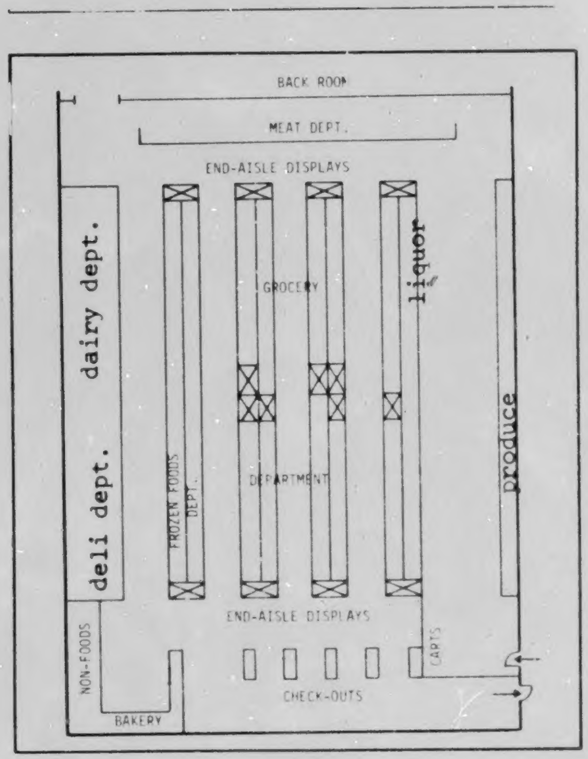
STORE LAYOUTS

Select 5 departments in each of the layouts and explain the reasons for their location in the total store layout.

SELFSERVICE STORE



SUPERMARKET



BAGGING CHECK SHEET

Instructions: Place a check after each procedure the student completes correctly.

PROCEDURES TO BE EVALUATED	
1. Did bagger reach inside bag and spread the corners?	
2. Were canned goods and heavy or bulky items placed in the bottom of the bag?	
3. Was sharp edged merchandise placed evenly to prevent ripping or tearing?	
4. Were glass containers put in the center of the bag?	
5. Were glass containers separated from each other?	
6. Were perishable items placed in a separate bag before being placed in a larger one?	
7. Were soft meat items bagged separately before being placed in a larger bag?	
8. Were fragile and crushable items placed at the top of the bag?	
9. Were frozen food items and ice cream placed in an insulated bag?	
10. Were soaps, bleaches, ammonia, and odor causing merchandise bagged separately?	

PROCEDURES TO BE EVALUATED	
11. Was merchandise packed above the top of any one bag?	
12. Did the bagger use both hands to bag?	
13. Were any items thrown or dropped into the bags?	
14. Were double bags used where necessary?	
15. Were bags of the correct size used?	
16. Was the weight in the bags evenly distributed?	
17. Did the bagger indicate to the customer that the order was being packed with special care?	
18. Was carryout service offered?	
19. What amount of time was taken to bag the order?	

Courtesy of National Cash Register.

CHECKING OUT MERCHANDISE CHECK SHEET

Instructions: Place a check after each procedure the student completes correctly.

PROCEDURES TO BE EVALUATED	
1. Smiled and greeted customer by name?	
2. Checked the bottom of the cart?	
3. Called prices to customer?	
4. Used the proper positioned amount control method of keyboard operation?	
5. Turned items over to look for prices - did not pick up items?	
6. Checked large bulky items as soon as practicable?	
7. Checked perishable and crushable items so that they could be placed at the top of a bag?	
8. Passed items back to bagger firmly?	
9. Checked the multiple-priced items together as one unit?	
10. Computed the price of a single unit of a multiple priced item correctly?	
11. Ran price checks on unmarked or illegibly priced items?	

PROCEDURES TO BE EVALUATED	
12. Weighed and priced produce correctly?	
13. Handled merchandise adjustments correctly?	
14. Handled coupons correctly?	
15. Subtotaled to determine sales tax?	
16. Issued and dispensed trading stamps?	
17. Computed and recorded sales tax?	
18. Handled overpurchases correctly?	
19. Examined and cashed checks correctly?	
20. Counted change back to customer?	
21. Placed receipt in the customer's bag?	
22. Handled store promotions correctly?	
23. Showed courtesy and consideration at all times?	
24. Thanked the customer and asked her to come back again?	
25. What amount of time was taken to check the order?	

Courtesy of National Cash Register

Number	Condition	Performance	Standard
902.01.01	Given a Salesperson, General Job Duties List	the student will: a. list four normal arrival procedures and allot time needed for each	accurately
		b. describe the six activities involved in preparing the work area	with five out of six correct
902.01.02	Given - list of closing procedures for reading and closing the register - daily sales report form - voids envelope - merchandise returns form - cash report form (from Competency 804)	the student will read and close the cash register	accurately
902.01.03	Given layaway problems and layaway forms	the student will: a. write the steps to be followed for a layaway from memory	with no exceptions
		b. correctly complete four consecutive layaway transactions	accurately
902.01.04	Given C.O.D. problems and saleschecks (from Competency 804)	the student will correctly complete two consecutive C.O.D. saleschecks	accurately
902.01.05	Given five different merchandise items with labels and/or tags attached	the student will list at least two customer benefits for each item	accurately
902.01.06	Given five persons of the same sex	the student will be able to identify the shirt/dress sizes	with 80% accuracy

Number	Condition	Performance	Standard
902.01.07	Given - merchandise - voucher - charge shipping costs - address labels - wrapping supplies	the student will: a. wrap and pack for mailing two sets of merchandise b. prepare the necessary forms	with the packages acceptable at the U. S. Post Office completely and legibly
902.01.08	Given a delivery schedule and destinations for five transactions	the student will match destinations and delivery dates	with 80% accuracy
902.01.09	Given a unit control form (Price Line Sales Sheet) and a set of 36 price tags	the student will fill in and total the unit control form	with 100% accuracy
902.01.10	Given an order copy or invoice and a set of 36 price tags	the student will write size and color on the price tags and verify that each is correct	accurately
902.01.11	Given stock cards (See Competency 809) and Stock Diagrams	the student will complete the forms	accurately
902.01.12	Given a list of ten trade journals	the student will select three and justify his selection	to the teacher's satisfaction
902.01.13	Given the responsibilities of the salesperson in preventing and controlling shoplifting	the student will give five preventative measures	that are currently being used in stores

Number	Instructional Ideas	Notes
902.02.01	Before a student is employed, he should list the exact arrival procedures for his training station. Additionally, he should be encouraged to walk through the prospective job station and record the time needed. Students already employed may be utilized as resource people.	
902.02.02	A list of closing procedures can be obtained from many stores. A sample is also included in this section. Many students, even when they have just started at a training station, are expected to close a a cash register. Emphasis should be placed on the kinds of information necessary for closing a cash register, i.e., dollar totals for each department, number of transactions, dollar amount of returns, etc., rather than general orientation to a specific store system.	
902.02.03	Two students may assume a role playing situation (a customer dictating the problems to a salesperson) to practice the five steps of layaways (#6 on the Job Duties List). This activity will help students learn to acquire the proper information and complete the form accurately.	
902.02.04	Although C.O.D. transactions have become increasingly rare, the potential salesperson should be made aware that failure to enter the C.O.D. balance area in the address label (see enclosed reference form) will result in giving the merchandise away.	
902.02.05	With the cooperation of a local merchant, the student may go to a store to record the information from the tags or merchandise may be borrowed for use in the classroom. Protection measures for borrowed merchandise should be worked out in advance. If goods are borrowed for display or sales demonstrations, this activity should be concurrently accomplished.	
902.02.06	To prepare for size estimating, the student should develop a chart of the height and weight of all the male and/or female students in the class and plot it on a chart of shirt and/or dress sizes. When the students have familiarized themselves with the charts, students from other classes may serve as customers for shirt and/or dress identification.	

Number	Instructional Ideas	Notes
902.02.07	Wrapping merchandise is better demonstrated than explained. If the student doesn't have the opportunity to learn this at his training station, invite someone from a local store to demonstrate gift wrapping and wrapping for mailing. The post office has a checklist on acceptable wrapping methods. The instructor can have students take their packages to the post office for acceptance or rejection. DECA offers numerous alternatives for students to practice this skill. Gift wrapping is a great fund-raising project at Christmas time. Offering to wrap books for the library, when they have some to mail, is both an excellent goodwill project and opportunity to evaluate students' proficiency. Empty boxes or pieces of wood can be used for wrapping instead of merchandise.	
902.02.08	Delivery schedules can be obtained from any store with a delivery service. In making up a list of destinations, attempt to make each transaction in a different delivery zone.	
902.02.09	Price line sales sheets (an example is included in this section), or other forms used for unit control, can usually be obtained from a large store. Sometimes it is even possible to get a collection of price tags, if they have extras, from the stores also. For this competency, however, be sure that the price tags are all from the same department. Since keeping neat and accurate records is very important in sales work, it is recommended that the instructor make up a master unit control form and require absolute accuracy.	
902.02.10	Verifying the correct marking of new goods is essential before they can be sold. While the goods themselves normally have size information as well as color description from which the price tags are marked, this simulation should be adequate for the competency. Forms should be available from local stores.	

Number	Instructional Ideas	Notes
902.02.11	Substitute real stock if the student is working or utilize a school store operation if one is available (counting pencils and pens can be a real challenge) and use stock cards, inventory forms, or simply a grid according to the goods. If the student is counting stock at work, accept a double count as accurate. If it is school store merchandise, have two students each count the goods.	
902.02.12	The library usually has lists of periodicals, including trade papers, which students can use as reference. Additionally, this activity might provide students with an opportunity to make an appointment with someone in their career field to ask about the advantages and disadvantages of each.	
902.02.13	Besides reviewing shoplifting prevention literature, students may interview a protection manager or a police specialist. Both guest speakers and films may be requested from the local police department or private protection firms. The salesperson's responsibilities should include observing, approaching everyone, reporting problems quickly, and knowledge of proper procedures.	

JOB DUTIES LIST

1. Record time of arrival, lunch break, and departure.
2. Place personal property in designated area.
3. Read notices and bulletin board (note sale items, ads, special events, policies, etc.).
4. Check personal appearance.
5. Prepare work area (dust, straighten, clean up).
6. Obtain supplies needed (salesbooks, pencils, bags, etc.).
7. Answer phone and intercom.
    a. Excuse self from customer
    b. Answer promptly and pleasantly
    c. Identify department or store and self
    d. Write down information and read back to verify
    e. Offer assistance if person asked for is not available
    f. Say a pleasant goodbye and hang up gently
8. Sell merchandise.
    a. Use vocabulary unique to the merchandise
    b. Develop and use good demonstration techniques
    c. Become familiar with nationally advertised brands
    d. Know who your competition is and what their prices are
    e. Relate merchandise to seasonal fashions
    f. Learn the materials and construction used in merchandise
    g. Be able to explain how to use and care for merchandise
    h. Become familiar with styles and be able to relate them to customer type
    i. Know features of merchandise and be able to give customer benefits
    j. Promote related merchandise and multiple sales
    k. Be able to explain credit plans available
    l. Treat merchandise with respect
    m. Keep hands and nails in smooth, attractive condition
    n. Unless particular price range is suggested, start with medium and try to sell up
9. Remove dust covers and put away.
10. Set up and operate cash register.
    a. Get change fund and count to verify
    b. Face bills and place change in till
    c. Record sales and voids as required
    d. Remove change at end of day, count and record
    e. Take change to office

JOB DUTIES LIST (continued)

11. Complete saleschecks.
    a. Write legibly or print
    b. Use charge plate or verify name(s) and address(es)
    c. List and verify merchandise, units, prices and total
    d. Void as necessary, using company procedure
    e. Verify credit according to company policy
12. Process Lay Aways.
    a. Obtain deposit as required by company policy
    b. Fill out Lay Away form completely
    c. Confirm payments and time of pick-up with customer
    d. Give customer receipt and tell him where to make payments
    d. Tag merchandise properly for storage in Lay Away area
13. Wrap or bag merchandise
    a. Ring sale before wrapping
    b. Select proper size bag or paper
    c. Put salescheck or receipt (and promotional material) in package
    d. Wrap neatly and securely
    e. Gift wrap if requested and if can do so
14. Make refunds and exchanges.
    a. Prepare proper forms
    b. Follow store policy on time limits
    c. Maintain customer's goodwill
    d. Get authorization
    e. Offer suitable substitute
15. Adjust complaints or refer them to proper authority.
16. Count stock at specified intervals.
    a. Use proper forms and methods
    b. Count carefully and accurately
    c. Record accurately and neatly
17. Maintain reserve stock.
    a. Arrange according to a plan
    b. Rotate merchandise (first in, first out)
    c. Keep merchandise clean
    d. Verify amount received and price before storing
    e. Ticket if necessary

JOB DUTIES LIST (continued)

18. Keep floor stock current, clean and arranged attractively.
    a. Remove damaged or deteriorated merchandise and dispose of it according to policy
    b. Return defective merchandise to manufacturer
    c. Straighten shelves and displays
19. Assist with window and interior displays.
    a. Order or make signs
    b. Keep records of merchandise on display
    c. Clean and/or repair merchandise before returning it to stock
    d. Keep interior displays clean and up to date

READING & CLOSING THE REGISTER

A. Collect Data
  1. Get a Daily Sales Report Form
  2. Get Returned Merchandise Sheet and total
  3. Get Voids envelope from register drawer and total

B. Fill in Daily Sales Report
  1. Enter date, department, and hours worked for each employee
  2. Move key to "Read" position
  3. Read salesperson totals and enter
  4. Read department totals and enter department total for each register
    a. If sales tax rung separately, do not enter
    b. If sales tax rung in with sale, compute tax estimate @ 6% and enter less sales tax box
  5. Read transactions and enter

C. Clear and Reset Register
  1. Move key to clear position
  2. Ring each salesperson and call department key
  3. Open side of register and change date
  4. Verify date with no sale key (leave drawer open)
  5. Wind detail tape until well past last ring, cut, and remove
  6. Re-thread detail tape or replace if needed
  7. Clear transaction counter

D. Prepare Cash to Take to Cashier
  1. Count each denomination, starting at the top, and list number on ending side of Cash Report form
  2. Place cash in cash bag as you count
  3. Total cash items (checks, refunds, etc.) and write total on bottom of Cash Report form and place in cash bag
  4. Check cash till, close drawer, and total Cash Report Form
  5. Turn in Cash Report form and cash to cashier as you leave the store

E. Finish Cash Report
  1. Enter voids
  2. Enter returns
  3. Add department totals for each register
  4. Subtract voids and sales tax estimate if necessary
  5. Enter subtotal under Total Gross Sales
  6. Subtract returns
  7. Clip Daily Sales Report form, Merchandise Return sheet, and Voids Envelope together, and take with cash bag and Cash Report form to cashier

DAILY SALES REPORT

FORM 3-166

DAILY SALES REPORT

DATE	DEPT. NO.

Report all employees who worked in your Department today – Basics and Extras (including Stock and Clericals. Specify classification if other than selling).

Mark "absent" opposite any regular who is absent; fill in hours worked for each employee present.

Deposit original and duplicate in slot on Mezzanine Floor marked "Sales Reports."

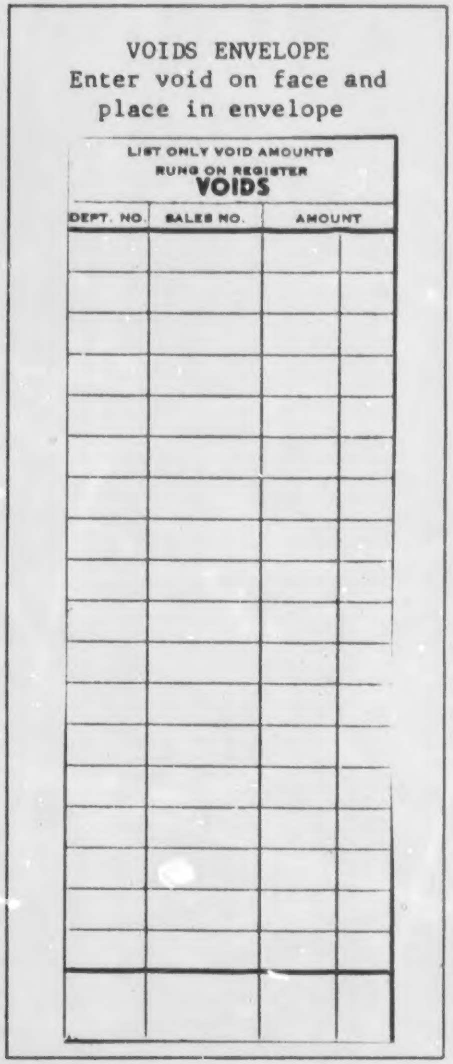
Retain triplicate in your department.

EMPLOYEE NO.	HOURS	TOTAL SALES		TRANSACTIONS
MANAGER				
ASSISTANT				
Basics				
Extras				
Registers				
Total Readings:				
Less Voids				
(Sub total)				
Less Sales Tax				
(Sub total)				

Note: Do not fill in Sales Tax if your Dept. uses a tax key.

Cash Register Transactions (Include Total From ALL Registers) ➡				
TOTAL GROSS SALES				
RETURNS				
NET SALES				

Reported by



VOIDS ENVELOPE
Enter void on face and
place in envelope

LIST ONLY VOID AMOUNTS
RUNG ON REGISTER
VOIDS

DEPT. NO.	SALES NO.	AMOUNT

MERCHANDISE RETURNS

3-289 3/68

DEPT. NO.

DATE

Total Returns

Returns $

Credits $

PRICE LINE	UNITS	PRICE LINE	UNITS	PRICE LINE	UNITS	PRICE LINE	UNITS	PRICE LINE	UNITS	PRICE LINE	UNITS	PRICE LINE	UNITS	PRICE LINE	UNITS
CLASSIF. 1		CLASSIF. 2		CLASSIF. 3		CLASSIF. 4		CLASSIF. 5		CLASSIF. 6		CLASSIF. 7		CLASSIF. 8	
CLASSIF. 9		CLASSIF. 10		CLASSIF. 11		CLASSIF. 12		CLASSIF. 13		CLASSIF. 14		CLASSIF. 15		CLASSIF. 16	
CLASSIF. 17		CLASSIF. 18		CLASSIF. 19		CLASSIF. 20		CLASSIF. 21		CLASSIF. 22		CLASSIF. 23		CLASSIF. 24	
CLASSIF. 25		CLASSIF. 26		CLASSIF. 27		CLASSIF. 28		CLASSIF. 29		CLASSIF. 30		CLASSIF. 31		CLASSIF. 32	
CLASSIF. 33		CLASSIF. 34		CLASSIF. 35		CLASSIF. 36		CLASSIF. 37		CLASSIF. 38		CLASSIF. 39		CLASSIF. 40	
CLASSIF. 41		CLASSIF. 42		CLASSIF. 43		CLASSIF. 44		CLASSIF. 45		CLASSIF. 46		CLASSIF. 47		CLASSIF. 48	

LAYAWAY PROBLEMS

1. Mrs. R. J. Happy, 1539 Glad Lane, Joy, CA 93030, comes into the Toy Department (Dept. 660) to select Christmas presents. She selects a bicycle (class 10) @ $49.95 for her son; a tricycle (class 11) @ $29.95 for her daughter; a doll (class 5) @ $7.95; and an Explorer game (class 3) @ $5.95. She wants these put on layaway until Christmas, and will put a $20.00 deposit on now. This is November 1st. How many payments of how much each will she need to pay to pick them up by December 20th?

2. Miss Ima Neworker, 1226 Hopeful Way, Newton, CA 92000, comes into the Coat Department (Dept. 360) to find a new winter coat. She finds just the one (class 4) for $79.95, and asks to put it on layaway. Right now she only has $15.00 (and would prefer to keep $5.00), but she gets paid every two weeks and can afford to pay $15.00 from each pay check. If it is now August 25th (paydays are the 10th and 25th), when can she pick up the coat?

3. Mr. Tom Newlywed, 10175 Wisteria Blvd., Apt. E, San Chico, CA 91746, wants to get his wife a silver necklace and earrings from the Jewelry Department (Dept. 140) (class 7), @ $39.95 a set. He only has $5.00 right now, but can pay $10.00 every week, starting next week. If he got married five days ago, will he have the set in time for his first month anniversary?

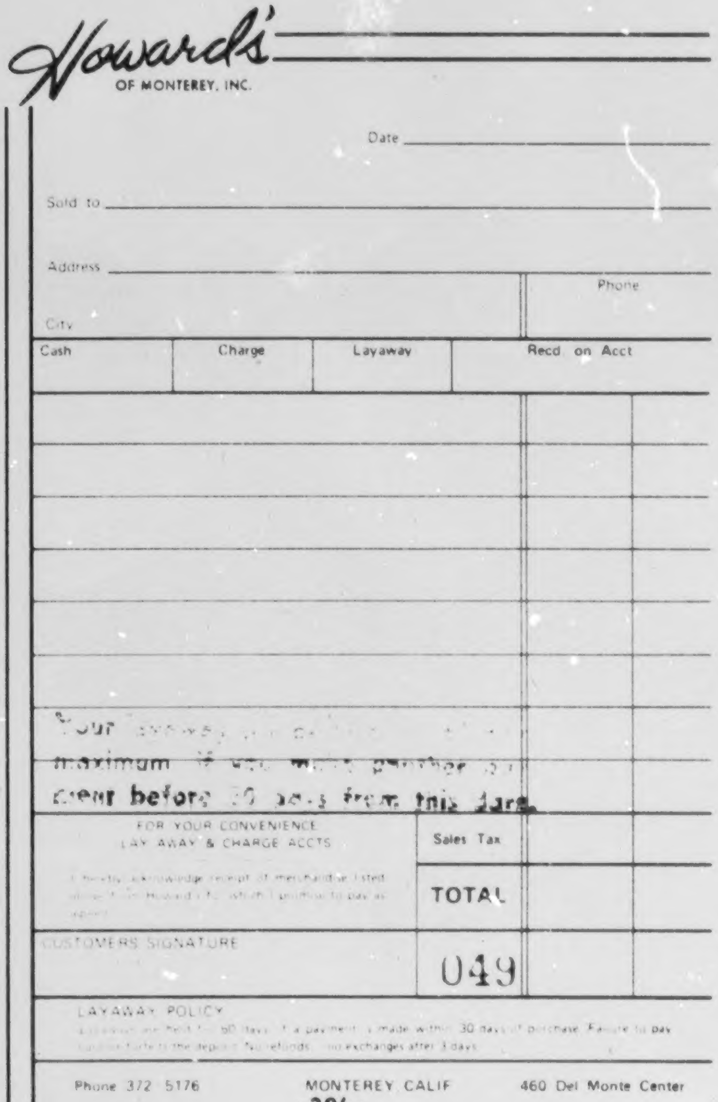
4. Miss Hopeless Hannah, 436 Dismal Lane, Sobsville, CA 90327, needs a crying towel (Linen Dept. 60), and decides on a lovely lavender one (class 9) @ $25.00, which is more than she expected. She can give you $10.00 now and $2.00 a week. How soon can she call it her own?

5. Mr. Jack Jones of 1919 Smith Street, Johnsonville, CA 98901, is interested in a new dining table (class 10) on special for $224.95, for his wife's birthday which is two months away. They are on sale now, but he does not want to pick it up until then. If he pays 20% now, how much will he have to pay when he picks it up?

6. Mrs. Harry Jamison of 49 Orchard Road, Almond City, CA 93748, is very much interested in a silver, full-length party dress (class 33) @ $59.95 (the last one you have like this), but wants her husband, who will be out of town for several more days, to see it. You suggest she put it on layaway until he returns, and she gives you a $10.00 deposit. When Mr. Jamison sees the dress, he does not like it but convinces Mrs. Jamison to buy a rose print, full-length party dress (class 33) @ $44.88. Describe what you will have to do.

7. Mr. Harry Chest of 104 Sunbathing Place in Fogtown, CA 96699, purchases a Shining Super Silver Sun Lamp @ $39.95 (Dept. 99) (class 26), and a Shining Super Silver Sun Lamp bulb for $6.95 (Dept. 99) (class 29) to be put on layaway. They only have a display model in stock, so they would order the two items for Mr. Chest. Forty-five days delivery time is needed. The purchase was made on November 10th and will be in the store on December 15th. Mr. Chest said he would make two payments in a 30-day period. Will he get the sunlamp for Christmas? What date will he be able to pick up his merchandise?

LAYAWAY FORM



Howard's
OF MONTEREY, INC.

Date

Sold to

Address

City

Phone

Cash	Charge	Layaway	Recd on Acct

Your [illegible] maximum [illegible] ment before [illegible] days from this date.

FOR YOUR CONVENIENCE
LAY AWAY & CHARGE ACCTS

I hereby acknowledge receipt of merchandise listed above from Howard's [illegible] which I promise to pay as agreed.

Sales Tax	
TOTAL	

CUSTOMERS SIGNATURE

049

LAYAWAY POLICY
Layaways are held for 60 days if a payment is made within 30 days of purchase. Failure to pay [illegible] forfeits the deposit. No refunds [illegible] no exchanges after 3 days.

Phone 372 5176 MONTEREY CALIF 460 Del Monte Center

Courtesy of Howard's of Monterey

C.O.D. PROBLEMS

1. Yesterday, Mrs. Paul Petrovsky, of 1234 - 98th Avenue, Oakland, CA 94601, came into the Housewares Department (Dept. 670) and looked at several types of casseroles. Today, she has called you and asked you to send out one that is $12.95, class 23. She wants it sent out C.O.D. as she does not have a charge account. It is the store policy to charge a C.O.D. fee of 50¢ for this service, and she agrees to this. (A fee is not taxable.) Mrs. Petrovsky's phone number is 446-4589.

2. Mrs. William Mater of 1703 Poplar Avenue, Boystown, CA 90111, calls the Boy's Department (Dept. 550) and orders 6 T-shirts, class 3, @ 3/$2.00; 12 prs. socks, class 1, @ 59¢ a pair; 8 pr. of jeans, class 5, @ $5.99 each; 4 pajamas, class 12, 2 @ $1.95 each and 2 @ $2.50 each; and 1 windbreaker, class 9, @ $15.95. She does not have an account with us, but asks you to send these out C.O.D. Her phone number is 439-8743.

3. Mrs. Earl Winter of 3491 - 106th Avenue, Santa Ynez, CA 93576, is in Women's Shoes (Dept. 421) and decides to purchase 3 pair of shoes, class 17, @ $17.95 each, and 1 pair, class 15, @ $19.95. She does not have that much money with her, however, and does not wish to open a charge account, so asks you to send them to her C.O.D. Since store policy requires a deposit on C.O.D. sales, whenever possible, she says she is happy to give you a $20.00 deposit and pay the balance when the merchandise is delivered. This transaction will require two saleschecks: one is called a "By Cash" and is your record and her receipt for the $20; the other is the C.O.D. salescheck. Remember to subtract the "By Cash"!

4. Mrs. J. C. Pennel calls the Men's Furnishings Department (Dept. 511) asking you to send out 1 pair of pajamas, class 4, @ $3.95, and 2 undershirts, class 2, at 3/$2.50, C.O.D. Her address is 3274 - 45th Street, Redding, CA 97642, and her phone is 721-1463.

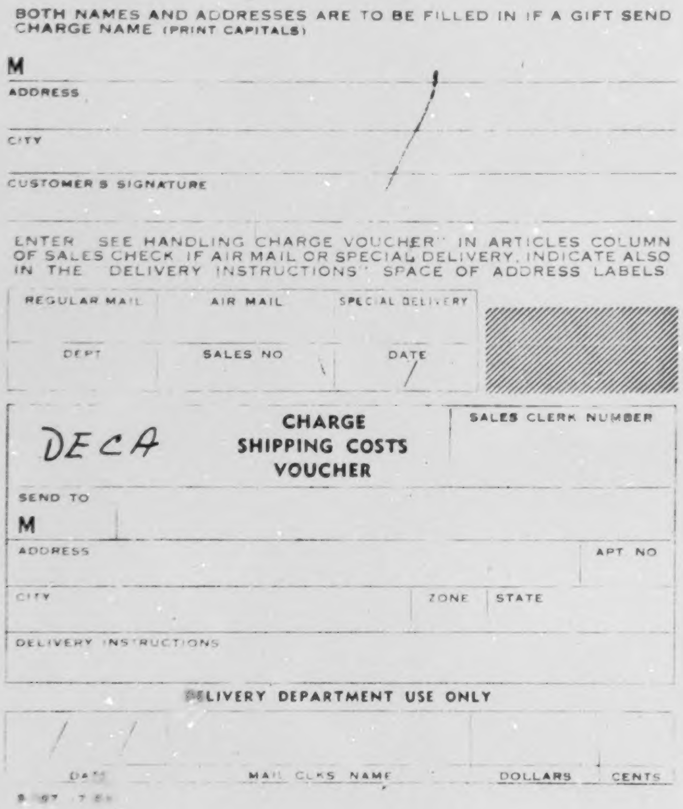
5. Mr. Winton Winton of 16793 Winton Avenue, Winton, CA 98765, comes into the Carpet Department (Dept. 760) looking for an area rug. He finds one, class 5, for $34.95, and asks you to send it to his home, C.O.D. He will pay you $10 on deposit.

6. Mrs. J. V. Wheatly, 3417 Rockway Road, Piedmont, CA 94611, is in the Furniture Department (Dept. 720) and finds a chair she particularly likes -- a Winton easy chair, style 157 in blue tweed, class 27, $69.95. She asks you to send it out C.O.D., and will give you $15 on deposit.

7. Mr. James Ledbetter, 598 Courtland Drive, Susanville, CA 98960, decides to buy a new suit (Dept. 540), class 7, $105.00. It has to have the trousers cuffed (no charge) and he decides to pay $25 on it now and the balance when it is delivered C.O.D.

MAILING FORMS

CHARGE SHIPPING COSTS VOUCHER



BOTH NAMES AND ADDRESSES ARE TO BE FILLED IN IF A GIFT SEND
CHARGE NAME (PRINT CAPITALS)

M

ADDRESS

CITY

CUSTOMER'S SIGNATURE

ENTER "SEE HANDLING CHARGE VOUCHER" IN ARTICLES COLUMN OF SALES CHECK. IF AIR MAIL OR SPECIAL DELIVERY, INDICATE ALSO IN THE "DELIVERY INSTRUCTIONS" SPACE OF ADDRESS LABELS

REGULAR MAIL	AIR MAIL	SPECIAL DELIVERY
DEPT	SALES NO	DATE /

DECA

CHARGE SHIPPING COSTS VOUCHER

SALES CLERK NUMBER

SEND TO

M

ADDRESS APT NO

CITY ZONE STATE

DELIVERY INSTRUCTIONS

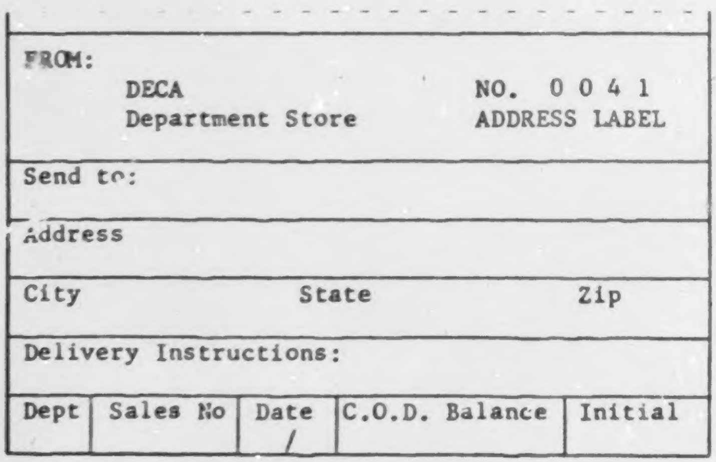
DELIVERY DEPARTMENT USE ONLY

DATE / /	MAIL CLKS NAME	DOLLARS	CENTS

[illegible]

Use this form to charge a customer for the shipping costs.

ADDRESS LABELS



FROM:
DECA
Department Store

NO. 0041
ADDRESS LABEL

Send to:

Address

City State Zip

Delivery Instructions:

Dept	Sales No	Date	C.O.D. Balance	Initial
		/		

Fill out address labels in duplicate. Retain one copy for department records.

PRICE LINE SALES

STORE

3-289 3/68

DEPT. NO.	SALES NO.

DATE	TOTAL SALES
	CASH $
	CHARGE $

PRICE LINE	UNITS	PRICE LINE	UNITS	PRICE LINE	UNITS	PRICE LINE	UNITS	PRICE LINE	UNITS	PRICE LINE	UNITS	PRICE LINE	UNITS	PRICE LINE	UNITS
CLASSIF. 1		CLASSIF. 2		CLASSIF. 3		CLASSIF. 4		CLASSIF. 5		CLASSIF. 6		CLASSIF. 7		CLASSIF. 8	
CLASSIF. 9		CLASSIF. 10		CLASSIF. 11		CLASSIF. 12		CLASSIF. 13		CLASSIF. 14		CLASSIF. 15		CLASSIF. 16	
CLASSIF. 17		CLASSIF. 18		CLASSIF. 19		CLASSIF. 20		CLASSIF. 21		CLASSIF. 22		CLASSIF. 23		CLASSIF. 24	
CLASSIF. 25		CLASSIF. 26		CLASSIF. 27		CLASSIF. 28		CLASSIF. 29		CLASSIF. 30		CLASSIF. 31		CLASSIF. 32	
CLASSIF. 33		CLASSIF. 34		CLASSIF. 35		CLASSIF. 36		CLASSIF. 37		CLASSIF. 38		CLASSIF. 39		CLASSIF. 40	
CLASSIF. 41		CLASSIF. 42		CLASSIF. 43		CLASSIF. 44		CLASSIF. 45		CLASSIF. 46		CLASSIF. 47		CLASSIF. 48	

ORDER COPY FOR FLOOR MARKING

DECA
0000 Capitol Mall
Sacramento, CA 00000

DATE OF ORDER 7/12/84
F.O.B. POINT NY
DATE TO BE SHIPPED 7/20/84
TERMS 8/10 EOM
DATING 30 net
FREIGHT ALLOWANCE

MFG'S NUMBER J7
NAME Jolly Roger
ADDRESS 1972 West Ave
CITY and STATE New York, NY
ZIP 10000

SHIP TO ☑ DECA Store
0000 Capitol Mall
Sacramento, CA 00000

SHIP TO ☐ DECA - Service Bldg
1 Poplar St.
Sacramento, CA 00001

MDSE MADE OF Rayon
MDSE KNOWN AS Skirt

SHIP VIA PIE

SPECIAL INSTRUCTIONS FOR DISTRIBUTION OF MDSE
☑ STORE ☐ SERVICE BLDG STOCK

THIS ORDER MUST BE SHIPPED COMPLETE OR PREPAY BALANCE

Class	STYLE NO	DESCRIPTION	SIZES					OAKLAND		TOTAL QUANTITY	UNIT COST	TOTAL COST	UNIT RETAIL
			10	12	14	16	18	20	SUB TOTAL				
2	250	Classic A-line								36	4 50	162 —	7 50
		skirt											
		blue/green	2	3	4	4	4	3	20				
		pink/orange	1	2	2	2	1		8				
		lav/purple		1	2	2	2	1	8				

TYPE OF MARKING
PIN ☐ GUM ☐ STRING ☑ PRETICKET ☐ PRINT PUNCH ☐

ALL ORDERS TO BE VALID MUST BE SIGNED BY THE MERCHANDISE OFFICE
DEPT MGR
MDSE OFFICE

DECA 511 T 3 5.95	DECA 511 T 1 2.99	DECA 511 N 2 7.50	DECA 511 2 7 3.50	DECA 511 T 1 4.99	DECA 511 T 2 7.50	DECA 511 T 2 9.50	DECA 511 T 5 14.95	DECA 511 T 3 4.95
DECA 511 T 4 .99	DECA 511 N 3 3.95	DECA 511 T 3 5.95	DECA 511 T 5 14.95	DECA 511 N 1 2.99	DECA 511 T 1 2.99	DECA 511 T 4 1.99	DECA 511 N 4 2.99	DECA 511 T 6 25.00
DECA 511 T 1 4.99	DECA 511 T 5 17.95	DECA 511 N 3 3.95	DECA 511 T 3 4.95	DECA 511 T 4 .99	DECA 511 N 3 3.95	DECA 511 T 6 30.00	DECA 511 T 3 5.95	DECA 511 N 4 1.99
DECA 511 T 2 10.95	DECA 511 T 4 .99	DECA 511 N 4 .99	DECA 511 T 4 1.99	DECA 511 T 1 2.99	DECA 511 T 2 7.50	DECA 511 T 2 9.50	DECA 511 T 4 1.95	DECA 511 T 6 24.95

Dept.
season letter
+
classification

Price

DECA 375 375 T 2 T 2 250 250 7.50 7.50	DECA 375 375 T 2 T 2 250 250 7.50 7.50	DECA 375 375 T 2 T 2 250 250 7.50 7.50	DECA 375 375 T 2 T 2 250 250 7.50 7.50	DECA 375 375 T 4 T 4 250 250 7.50 7.50	DECA 375 375 T 2 T 2 250 250 7.50 7.50	DECA 375 375 T 2 T 2 250 250 7.50 7.50	DECA 375 375 T 2 T 2 250 250 7.50 7.50	DECA 375 375 T 2 T 2 250 250 7.50 7.50	← store name ← dept. season + class ← style ← price
DECA 375 375 T 2 T 2 250 250 7.50 7.50	DECA 475 475 T 2 T 2 250 250 7.50 7.50	DECA 475 475 T 2 T 2 250 250 7.50 7.50	DECA 375 375 T 4 T 4 250 250 7.50 7.50	DECA 375 375 T 4 T 4 350 350 7.50 7.50	DECA 375 375 T 2 T 2 350 350 7.50 7.50	DECA 375 375 T 2 T 2 350 350 7.50 7.50	DECA 375 375 T 2 T 2 350 350 7.50 7.50	DECA 375 375 T 2 T 2 350 350 7.50 7.50	
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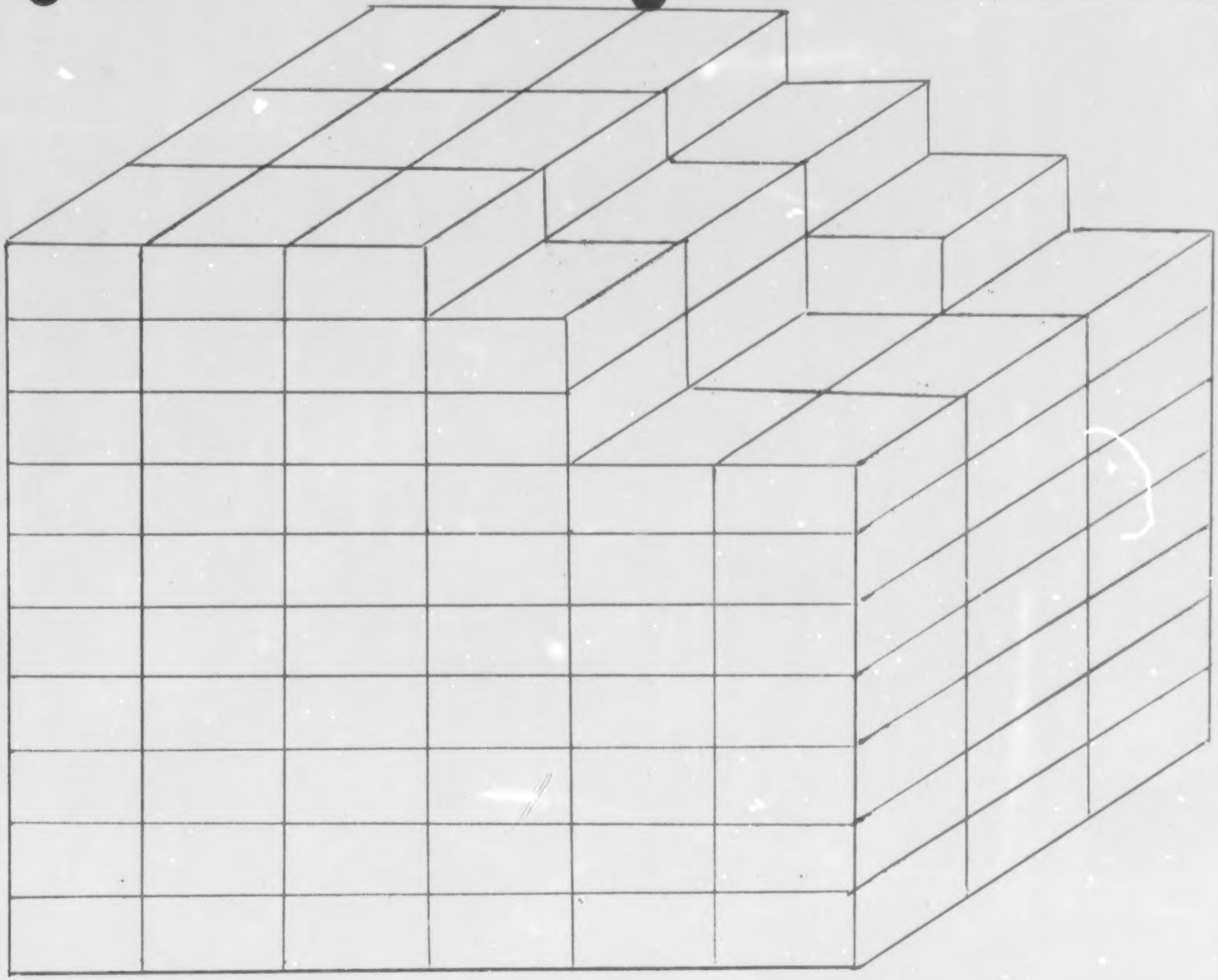
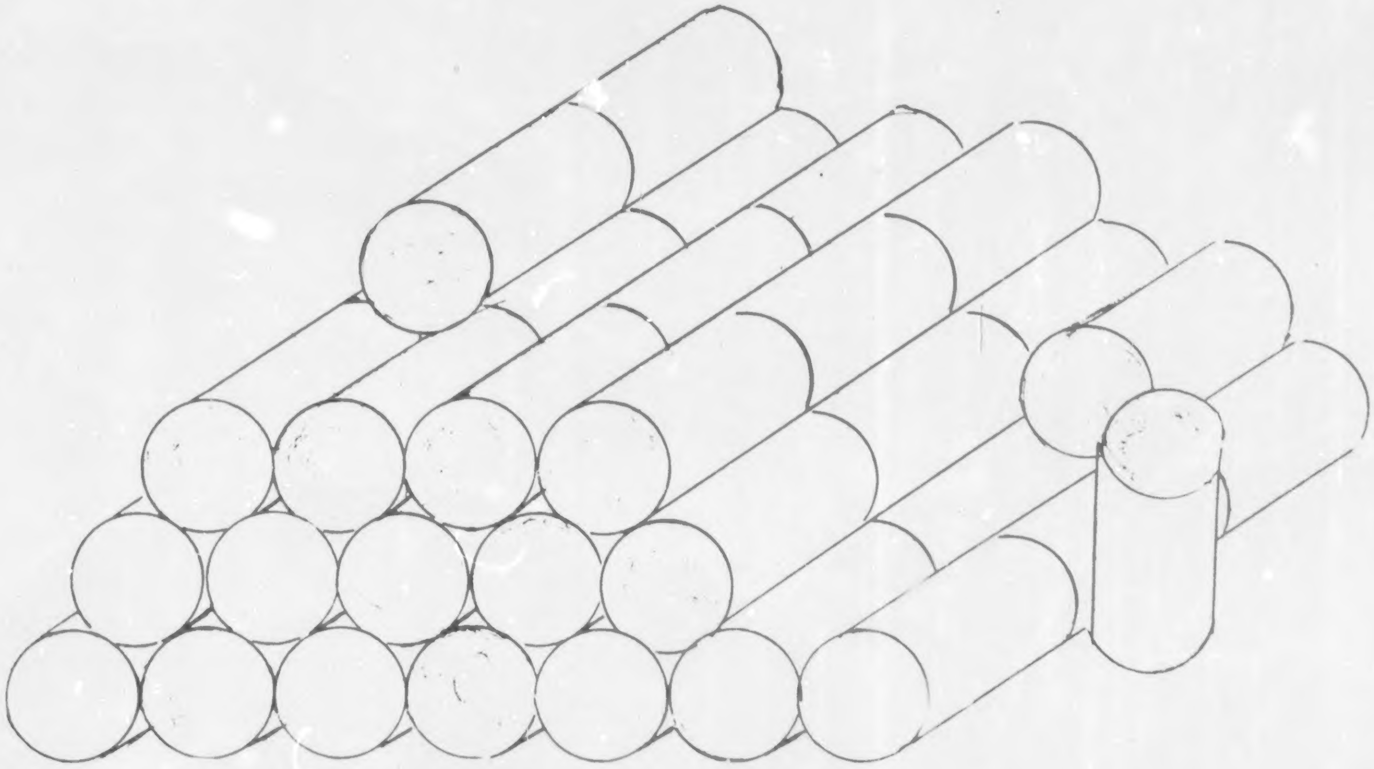


Item No. C-224J Isle 14 Bin 8 Cost Price .85 Sale Price 1.25

Supplier R-207 Reorder Level 200

Courtesy Merle Wood, Oakland Public Schools

STOCK DIAGRAM



Item No. D-218 Isle 14 Bin 9 Cost Price 2.98 Sale Price 3.10

Supplier B-4 Reorder Level 5

Courtesy Merle Wood, Oakland Public Schools

Number	Condition	Performance	Standard
903.01.01	Given Service Station Attendant Job Duties List	the student will: a. list 4 normal arrival procedures and allot time needed for each b. describe the 3 activities involved in preparing the work area c. describe the 3 responsibilities other than pumping gas	accurately
903.01.02	Given forms: - Seven Standards of Customer Greetings - Checklist on Your Appearance and Customer Acknowledgment - Examples of Spoken Greetings	the student will: a. develop a list of 3 reasons for each of the 7 standards b. complete form c. complete form	with 15 out of 21 correct with 12 out of 15 correct to the teacher's satisfaction
903.01.03	Given The Gasoline Sales Procedure form	the student will: a. fill in Part I in conversational form b. arrange in correct order	to teacher and student satisfaction accurately
903.01.04	Given Under-the-hood Service form	the student will write procedures for each under-the-hood service	with 10 out of 14 correct
903.01.05	Given information on windshield service	the student will identify the 4 main glass areas to be cleaned	accurately
903.01.06	Given a tire depth gauge and pressure gauge	the student will check 3 cars for tire problems	to a service station attendant's satisfaction
903.01.07	Given sales drafts and credit card printer	the student will make out 3 consecutive correct sales drafts	accurately
903.01.08	Given information on thanking a customer	the student will write 3 phrases	appropriate for expressing thanks

Number	Condition	Performance	Standard
903.01.09	Given Things and Services that Make a Good Impression on Your Customer sheet	the student will:	
		a. develop a customer survey rating sheet	to the leader's satisfaction
		b. interview 10 service station customers	completing the survey
		c. demonstrate or write in conversational form sales conversations for the 6 highest rated customer services	to the teacher's satisfaction
903.01.10	Given Eight Ways to Get Hurt on the Job sheet	the student will write preventive procedures for each condition	with 7 out of 8 correct
903.01.11	Given a service station attendant application blank	the student will fill out the Service Station Application	completely and correctly
903.01.12	Given a service station sales situation and a Service Station Attendant Rating Form	the student will complete a service station sale	with 130 points out of 150 points on the rating form

Number	Instructional Ideas	Notes
903.02.01	The Job Duties List form can be used for a guidance function to help the student check career possibilities. The student could interview service station managers to get first-hand information and then turn in a career report.	
903.02.02	The seven standards should be stressed because of the real impact on the customer. The customer should be approached as quickly as possible. Three companies stress the point that the attendant should be there when the customer turns off his engine. U. S. News and World Report states that 87% of all customers quit a service station because of improper service at the pump area. Student brainstorming would bring out these points in depth. Students could relate their personal experiences or have them go to a local station and observe.	
903.02.03	The attendant should ask for a "fill-up," putting it into his own words. The Gasoline Sale Procedure form is presented to develop a good customer sale. The student should go through the step-by-step procedure of providing service to the customer. This is not a rigid order of procedure, however, and he should be flexible on the job. The student needs to realize the importance of telling the customer the condition of his car.	
903.02.04	This curriculum is not designed to be an auto mechanics course, but the student should have enough background knowledge to service the car under the hood. The student could visit a local station and observe.	
903.02.05	Windshield service can be discussed briefly covering all windows, mirror, headlights, tail lights, and sometimes the inside of the car windows.	
903.02.06	This objective should be handled at a service station where the student can get in-depth training. Students should be instructed on tire inspection.	

Number	Instructional Ideas	Notes
903.02.07	The student should learn how to use the gas credit card system. If necessary, he could review Competency 804, Cashiering.	
903.02.08	Whether the customer is a complete stranger or the attendant's best friend, the attendant should indicate appreciation for his business. The student should include a "thank you" and an invitation to come back again. This could be stressed by several students writing out "thank you's" and exchanging papers for peer comment.	
903.02.09	The above seven standards lead to success, but it's the extras that make the difference. The list of Things That Might Make a Good Impression on Your Customer will give the student an opportunity to find out what the customer wants in service. Then the student can integrate his findings into the above seven standards.	
903.02.10	This objective can be expanded to include auto shop and/or service station interviews on safety rules.	
903.02.11	This is a repeat of the job application competency because there are some different items on this application; for instance, automotive courses completed and previous service station experience. The completed application could be taken to local service stations for possible job interviews.	
903.02.12	With the cooperation of a local station, the teacher could drive in his or her own car and have the student make the pump sale using all the seven points and any extra services he chooses to use. A rating form is provided for evaluation purposes.	
General:	A. This unit is for pump block sales only and doesn't include the "lube room." Students interested in Service Station Attendant should take an auto shop course for background. Check with the auto shop teacher for interdisciplinary activities.	

Number | Instructional Ideas | Notes

General: (continued)

B. Co-op students may have the opportunity to participate in company training programs. Perhaps the teacher could use the company training manual to teach in the classroom.

C. The American Petroleum Institute is a general clearinghouse for most publications in the industry. The address is:

Americal Petroleum Institute
1801 K Street, Northwest
Washington, D.C. 20006

JOB DUTIES LIST

Arrival Procedures

- a. Record time of arrival, lunch break, departure.
- b. Place personal property in designated area.
- c. Read notices and bulletin board. (Note sale ideas, ads, special promotions, policy changes, etc.)
- d. Check personal appearance.
- e. Prepare work area. (Place cash drawer and stamp dispenser on pump island and set us windshield cleaning equipment.)
- f. Obtain supplies needed. (Charge slip blanks, charge slip clipboard, rags, towels, and stock the oil racks.)

Service Station Attendant Duties

1. Answer phone:
    - a. Excuse self from customer.
    - b. Answer promptly and pleasantly.
    - c. Identify station and self.
    - d. Write down information and read back to verify.
    - e. Offer assistance if person asked for is not available.
    - f. Say pleasant good-bye and hang up gently.

2. Sell merchandise:
    - a. Use vocabulary unique to the merchandise.
    - b. Develop and use good demonstration techniques.
    - c. Become familiar with nationally advertised brands.
    - d. Know who your competition is and what their prices are.
    - e. Relate merchandise to seasonal needs.
    - f. Learn the materials and construction used in merchandise.
    - g. Be able to explain how to use and care for merchandise.
    - h. Become familiar with different models and be able to relate them to customer type.
    - i. Know features of merchandise and be able to give customer benefits.
    - j. Promote related merchandise and multiple sales.
    - k. Be able to explain credit plans available.
    - l. Treat merchandise with respect.
    - m. Keep hands clean and free of grease around cars.
    - n. Unless particular price range is suggested, start at the top and drop down only if necessary.

JOB DUTIES LIST (continued)

3. Set up and operate cash drawer:
    a. Get change fund and count to verify.
    b. Face bills and place change in till.
    c. Record sales and voids as required.
    d. Remove change at end of day, count, and record.
    e. Take change to office.

4. Handle credit card transactions:
    a. Always check list of card numbers not to be honored.
    b. Operate credit card machine properly.
    c. Record needed information on card completely and legibly.
    d. Have customer sign on proper line.
    e. Give customer his copy of sales slip.
    f. File station copy of sales slip in proper place.

5. Make refunds and exchanges:
    a. Offer suitable substitute.
    b. Prepare proper forms.
    c. Follow store policy on time limits.
    d. Maintain customer's goodwill.
    e. Get authorization.

6. Adjust complaints or refer them to proper authority.

7. Count stock at specified intervals:
    a. Use proper forms and methods.
    b. Count carefully and accurately.
    c. Record accurately and neatly.
    d. Fill stock in display racks.

8. Maintain reserve stock:
    a. Arrange according to a plan.
    b. Rotate merchandise (first in, first out).
    c. Keep merchandise clean.
    d. Verify amount received and price before storing.
    e. Ticket if necessary.

JOB DUTIES LIST (continued)

9. Assist with window and interior displays:
    a. Order or make signs.
    b. Keep records of merchandise on display.
    c. Clean and/or repair merchandise before returning it to stock.
    d. Keep interior displays clean and up to date.

10. Sell auto accessories and supplies:
    a. Be familiar with use or installation of item.
    b. Be familiar with ingredients or materials used in item.
    c. Give honest, but tactful, advice to customers.
    d. Develop and use effective demonstration techniques.
    e. Suggest additional items.

11. Keep salesroom and restroom clean:*
    a. Dust and wash fixtures daily or more often, if needed.
    b. Sweep and mop floor daily.
    c. Replenish supplies daily.
    d. Empty waste baskets and trash cans as often as needed.

12. Keep lube room clean and safe:*
    a. Scrub lube room regularly.
    b. Keep lift and floor free from grease and oil. Wipe up drippings at once.
    c. Pick up tools and wipe clean and put in proper place.
    d. Clean lube equipment after every use.
    e. Empty all refuse containers daily.

13. Take gasoline pump readings.

14. Put all exterior display merchandise into the lube room or salesroom.

*Major responsibilities not including handling customers.

STANDARDS OF CUSTOMER GREETINGS

Directions: Give three reasons, from the customer's point of view, for the following:

1. You and your station's appearance

a. ____________________

b. ____________________

c. ____________________

2. Prompt acknowledgment of customer's presence

a. ____________________

b. ____________________

c. ____________________

3. Your tone of voice

a. ____________________

b. ____________________

c. ____________________

4. When and the way you smile

a. ____________________

b. ____________________

c. ____________________

STANDARDS OF CUSTOMER GREETINGS (continued)

5. What you say

a. ______________________________

b. ______________________________

c. ______________________________

6. Where you stand

a. ______________________________

b. ______________________________

c. ______________________________

7. Your pleasant and friendly attitude

a. ______________________________

b. ______________________________

c. ______________________________

YOUR APPEARANCE AND CUSTOMER ACKNOWLEDGMENT

On the lines below, indicate by an "X" whether the items listed would have a good, bad, or no effect on your first impression of a service station salesman if you were the customer.

Good Impression	Bad Impression	No Effect	
			APPEARANCE
____	____	____	A uniform with some dirt on it but kept as clean as possible.
____	____	____	A clean uniform.
____	____	____	A badly soiled uniform.
____	____	____	A well groomed appearance.
____	____	____	Neat hair.
____	____	____	Daily shave.
____	____	____	Pleasant breath.
			ACKNOWLEDGE CUSTOMER'S PRESENCE
____	____	____	Having salesman get to the pumpblock about the same time you shut off your car's engine.
____	____	____	If salesman is tied up with another customer, but says something like, "Be right with you."
____	____	____	If salesman lets you wait until he finishes whatever he's doing.

YOUR APPEARANCE AND CUSTOMER ACKNOWLEDGMENT (continued)

In this next group of items, check _____ yes or _____ no, and then write your answer to the question "Why."

Yes	No	
_____	_____	Should you be pleasant to customers? Why? ______________________ ______________________
_____	_____	Should you greet customers by name? Why? ______________________ ______________________
_____	_____	Should you say something like, "Good morning (Good afternoon, or Good evening). . . Shall I fill the tank?" Why? ______________________ ______________________
_____	_____	Should you stand on the driver's side where the customer can see you easily? Why? ______________________ ______________________
_____	_____	Should you always be friendly? ______________ ______________________

A smile can be good or bad. When do you think a smile is good? ______________________

____

When do you think a smile is bad? ______________________

EXAMPLES OF SPOKEN GREETINGS

I. Check one or more lines below:

I Don't Like	I Feel Comfortable Saying	My Customer Would Like	
_____	_____	_____	"Good afternoon: Can I help you?"
_____	_____	_____	"Hello, Ms. Zimmerperson. Fill it with Supreme?"
_____	_____	_____	"Thanks for coming in. Shall I fill it up?"
_____	_____	_____	"Hi. Fill it today?"
_____	_____	_____	"Hey! What's happening today?"
_____	_____	_____	"Two gallons as usual, Mr. Aikin?"
_____	_____	_____	"Sorry to keep you waiting. Shall I fill it for you?"
_____	_____	_____	"I dig it, Doug! Regular today?"
_____	_____	_____	"Hi there, Claire. Fill it?"
_____	_____	_____	"It's after midnight, Dr. Callahan. This will be for exact change or on your credit card tonight?"

II. Write out greetings that you would feel comfortable saying and you think your customer would like.

1. "______________________________."
2. "______________________________."
3. "______________________________."

THE GASOLINE SALE PROCEDURE

I. The gas order (fill in conversational form)

A. Verbal sale

Salesman, "______________________________."

Customer, "______________________________."

B. Confirmation of the sale

Salesman, "______________________________."

Customer, "______________________________."

II. Gasoline service procedure (arrange the procedures in the correct order)

_____ 1. Set automatic nozzle so you can leave to service the car.

_____ 2. Caution: overfilling the tank, you can get gas on the ground, the car, and on you . . . plus an upset customer. (Keep a rag with you at all times.)

_____ 3. Remove gas cap and place on the nozzle or on top of pump (use the same place each time).

_____ 4. Crank pump to clear and start meter.

_____ 5. Replace gas cap and put nozzle back on the pump.

_____ 6. Place nozzle into tank carefully and quietly (hose shouldn't touch car).

_____ 7. Top off tank. Many cars will take three to four gallons after the automatic nozzle shuts off. (Pump reading should be adjusted to the even cent.)

UNDER-THE-HOOD SERVICE

I. Write out what you check for on the following:

A. Radiator: ____________________

____

B. Oil: ____________________

____

C. Battery and cables: ____________________

____

D. Drive belts: ____________________

____

E. Air filter: ____________________

____

F. Leaks (water and/or oil): ____________________

____

II. Answer the following questions:

A. What are the dangers of checking the radiator? ____________________

____

B. Write in conversational form to the customer:

Oil level is good--"____________________."

Oil level is low--"____________________."

UNDER-THE-HOOD SERVICE (continued)

II. (continued)

C. What are the dangers of corrosion around the battery and the cables? ____________________

____

D. Checking for leaks (oil or water) is an expected service to the customer?

Yes ____ No ____ Explain: ____________________

____

E. State the procedure for lifting the hood: ____________________

____

F. State the procedure for lowering the hood: ____________________

____

G. The hood is lifted to give the customer good service to prevent: ____________________

____

H. Give two reasons to check the condition of the customer's car:

1. ____________________
2. ____________________

THINGS THAT MIGHT MAKE A GOOD IMPRESSION ON YOUR CUSTOMER

Part I

1. Thanking them for their business and inviting them to come back again.
2. Topping off the tank on a fillup, but leaving room for expansion.
3. Giving fast and efficient service.
4. Waiting on them as soon as possible.
5. If they have to wait, customers want their presence acknowledged.
6. They want to feel the salesman knows what he is doing.
7. They want to be treated with respect.
8. They want the salesman to be friendly.
9. They like to feel their business is appreciated.
10. They want to be waited on by someone who'll express a sincere interest in helping them.
11. They want personalized attention.
12. When they ask for information, they want what they're told to be correct and given gladly.
13. They want to get whatever they need that caused them to come in and be back on their way as soon as possible with the least possible delay.

YOU'VE ALSO THOUGHT ABOUT . . .

14. Confirming the amount of money received.
15. Counting back change with the fewest number of coins and bills, starting with the amount of the purchase.
16. Offering traffic builders for which the customers must pay just prior to making the collection.
17. Giving out free traffic builders such as passouts and trading stamps along with the credit card invoice or change.

THINGS THAT MIGHT MAKE A GOOD IMPRESSION ON YOUR CUSTOMER (continued)

Part II

1. Empty ash trays.
2. Empty litter bags.
3. Sweep or vacuum inside of car.
4. Clean inside of windows.
5. Offer to add cleaning solution to windshield washer bottle.
6. Oil or grease hood hinges that squeak.
7. Clean windshield wiper blades.
8. Wipe off dash boards.
9. If there is a potential problem that may cause them inconvenience (for example, a low tire, a worn wiper blade, or a burned out light globe), they want to be made aware of it . . . They may not want, or be able, to have it fixed immediately, but they want to know about it.
10. They want a clean windshield. In many cases, the only evidence of what you've done for them that they can see when they leave is the windshield. Whether or not it's clean will have a definite effect on how they react to your service. A windshield that is streaked and hard to see through can give a bad impression of your service no matter what else you did.
11. Clean headlights.
12. Clean taillights.
13. They want the rear window cleaned.
14. They want the side windows cleaned.

EIGHT WAYS TO GET HURT ON THE JOB

1. Fire: ____

2. Oil:
   a. Adding oil: ________________________________
   b. Draining oil: ______________________________

3. Auto lift: ___________________________________

4. Tools: ______________________________________

5. Checking radiator: ___________________________

6. Battery and cables: __________________________

EIGHT WAYS TO GET HURT ON THE JOB (continued)

7. Servicing tires: ____________________

____

____

8. Lifting and carrying heavy objects: ____________________

____

____

EMPLOYMENT APPLICATION

SERVICE STATION SALESMAN

			DATE
NAME IN FULL			TELEPHONE NO
ADDRESS			SOCIAL SECURITY NO
HOW LONG AT THIS ADDRESS	FORMER ADDRESS		
MARRIED ☐ YES ☐ NO	WIFE EMPLOYED IF YES WHERE ☐ YES ☐ NO		BIRTHDATE
MILITARY SERVICE FROM ______ TO ______	BRANCH ______	RANK ______	LAST YEAR FORMAL SCHOOL
SPECIFY PHYSICAL DEFECTS			

AUTOMOTIVE COURSE COMPLETED ☐ YES ☐ NO	NAME OF COURSE	WHEN COMPLETED
	NAME OF COURSE	WHEN COMPLETED
	NAME OF COURSE	WHEN COMPLETED
PREVIOUS SERVICE STATION EXPERIENCE ☐ YES ☐ NO	WHERE	WHEN
	WHERE	WHEN
	WHERE	WHEN

WILLING TO BE BONDED ☐ YES ☐ NO

HAVE YOU EVER BEEN REJECTED FOR A BOND? ☐ YES ☐ NO

OCCUPATIONAL HISTORY	MONTH AND YEAR	MONTH AND YEAR	NAME AND ADDRESS OF EMPLOYER (LAST EMPLOYER FIRST)	REASON FOR LEAVING

FINANCIAL INFORMATION			CREDIT REFERENCES	NAME OF FIRMS	AMOUNT OWING
	HOME PAYMENTS OR RENT	$			$
	CAR PAYMENTS	$			$
	OTHER CONTRACT PAYMENTS	$			$
	MONTHLY LIVING EXPENSES	$			$
	HOSPITAL OR DOCTOR'S BILLS	$			$
	TOTAL MONTHLY INCOME NEEDED	$			

PERSONAL REFERENCE			
	NAME	ADDRESS	YEARS KNOWN
	NAME	ADDRESS	YEARS KNOWN
	NAME	ADDRESS	YEARS KNOWN

ARE YOU WILLING TO ATTEND SERVICE STATION TRAINING PROGRAM? ☐ YES ☐ NO

DATE

TO THE BEST OF MY KNOWLEDGE THE ABOVE INFORMATION IS TRUE AND CORRECT

SIGNATURE OF APPLICANT

2012 REV. 7-69

Compliments of American Petroleum Institute

SERVICE STATION ATTENDANT RATING FORM

Trainee ______________________ Initials of Rater ________ Date ____________

Circle the appropriate box for each category and total at the bottom.

	Excellent	Good	Poor
A. Recognize and greet the customer.	5	3	1
B. Learning and using customer names in greeting and selling.	5	3	1
C. Solicit the order. Ask for a fill-up.	10	5	2
D. Fill the order:			
1. Handling of cap for assurance to replace.	5	3	1
2. Caution not to overflow.	5	3	1
E. Clean the windshield and rear window.	10	5	2
F. Under the hood:			
1. Check oil, battery, fan belt, hose, and other.	20	10	3
G. Show, tell, and sell:			
1. Show the oil level and dip-stick.	10	5	2
2. Invite the customer to look at any item found needing replacement.	10	5	2
3. Tell services performed and items found to be satisfactory.	10	5	2
4. Tell reasons for replacement or service needed.	20	10	3
5. Sell product or service needed.	[illegible]	10	3
H. Complete the transaction:			
1. Collect cash or charge.	10	5	2
2. Thank the customer	5	3	1
3. Invite him to return.	5	3	1
TOTAL:			

I. Comments: ____

____

____

Number	Condition	Performance	Standard
904.01.01	Given a Waiter-Waitress Job Duties List	the student will a. list 5 daily habits they should perform prior to arriving at place of employment b. list 5 things they should do upon arriving for work shift	accurately accurately
904.01.02	Given information on the need for good service	the student will explain in writing 4 major reasons for good service	to the teacher's satisfaction
904.01.03	Given instruction on food handling skills	the student will demonstrate a. carrying water b. pouring coffee c. carrying plates d. handling condiments	to the teacher's satisfaction
904.01.04	Given food merchandising techniques on: - table arrangements - food placement on table - food displays - suggestion selling	the student will demonstrate 2 applications for each category	with 6 out of 8 correct
904.01.05	Given a Service Attitude Rating Sheet	the student will complete the sheet and identify 3 attitudes he needs to improve	to the teacher's satisfaction
904.01.06	Given a list of 10 common restaurant terms	the student will explain the terms	with 80% accuracy

Number	Condition	Performance	Standard
904.01.07	Given information on - safety of the guest - legal considerations - labor unions - fringe benefits to employees - sanitation laws - theft, and the importance of control	the student will complete a written test	with 80% accuracy
904.01.08	Given instructions on preparing and maintaining a service area and a work station	the student will a. list 3 responsibilities in the service area b. list 3 responsibilities at the work station c. diagram a table service for 3 people	accurately
904.01.09	Given information on the preparation and presentation of a guest check and menu	the student will write a guest check for a minimum of three people	with no errors in the format, spelling, pricing, or tax computation

Number	Instructional Ideas	Notes
904.02.01	The job description and/or Job Duties List gives students an insight into what is expected regarding personal habits.	
904.02.02	Good service helps keep business in operation, increases profit, provides employment, gains new and repeat customers.	
904.02.03	Students will benefit from simulation in handling food, beverages, and china.	
904.02.04	Diagrams will be helpful in drawing place setting or students can practice with your school cafeteria equipment.	
904.02.05	See Attitude Rating Sheet.	
904.02.06	Make up a glossary from local restaurant menus. Use restaurant training books and trade magazines.	
904.02.07	See local health department for a set of city sanitation regulations. Use a guest speaker such as a manager of a large restaurant. A local tax office can provide information about income tax regulations regarding tips.	
904.02.08	Maintaining the service area is the responsibility of the entire staff of waiters and waitresses. Maintaining the stations is an individual responsibility of each waiter-waitress.	
904.02.09	See Presenting and Preparing a Guest Check.	

JOB DUTIES LIST: WAITER-WAITRESS

General duties and responsibilities for Waiter-Waitress

- Maintain neat, attractive personal appearance.
    - Use conservative, yet adequate makeup.
    - Neat clean, well-pressed, appropriate uniform--changed daily.
    - Bathe daily and use deodorant.
    - Wash hair frequently and use hair styling to minimize stray hair.
    - Wear cap or style as specified by employer to control hair.
    - Wear comfortable, but appropriate low-heeled shoes.
    - Keep hands and nails well manicured and use conservative polish.
    - Wash hands frequently during serving periods.
    - Maintain good posture.

Arrival procedures

1. Record time of arrival, lunch breaks, and time of departure.

2. Place personal property in designated area.

3. Read notices and bulletin board.
    - Note menu changes.
    - Note special events.
    - Note announcements of policy change, special hours, etc.

4. Check personal appearance such as hair, uniform, lipstick, etc.

5. Prepare work area.
    - Clean and supply work area as needed.
    - Check work stations for proper setup.

6. Obtain supplies and equipment needed, such as guest checks, pencil, etc.

SERVICE ATTITUDE RATING SHEET

Given below are statements on waiter-waitress attitude. Consider each statement and answer it as honestly as you can about yourself. There are three ways to mark your rating sheet:

__A__ means you agree with the statement made.
__D__ means you disagree with the statement made.
__U__ means you are uncertain about your feeling.

_____ 1. You should enjoy meeting people and talking about their interests.

_____ 2. Suggestion selling benefits the restaurant more than the customer.

_____ 3. Most restaurant failures are due to poor service and management.

_____ 4. Your personal appearance affects your income.

_____ 5. You should usually follow company procedures for preparing a guest check.

_____ 6. You should avoid loud talking and personal conversations with friends in the presence of customers.

_____ 7. You should have a cup of coffee and relax during your spare time.

_____ 8. People go to exclusive restaurants more for good food and service than to be seen.

_____ 9. You should also be loyal to the business where you are employed.

_____10. Greet customers by name--it makes them feel wanted.

_____11. If you have a break, relax and enjoy yourself.

_____12. You should cooperate with employer and fellow workers.

_____13. You should be on time for work.

_____14. When you do not have items requested, you should suggest related items.

SERVICE ATTITUDE RATING SHEET (continued)

_____15. You should always be warm and friendly to everyone.

_____16. Suggestion selling benefits the restaurant more than the waiter-waitress.

_____17. You should always maintain control of your temper, except when confronted by obnoxious clientele.

_____18. Most customers would rather be served by a friendly waiter-waitress than an efficient one.

_____19. The waiter-waitress should be more concerned with satisfying the customer at the moment than with insuring his return.

_____20. Waiter-waitress actions toward customers are considered representation of the business.

_____21. Restaurant goodwill is based on the service provided by the waiter-waitress as well as on the quality of the food.

_____22. Selling techniques are not important in waiter-waitress work.

_____23. Most customers would rather serve themselves than be served by the waiter-waitress.

PREPARING AND PRESENTING A GUEST CHECK

A. Basic technique for check preparation
   1. Hold book of guest checks in hand. Never set on table to write.
   2. Keep checks neat and clean. If smudged or smeared, have manager void the check and rewrite.
   3. Be accurate.
   4. Double check your ticket by orally repeating order to customer. If an error has been made, it can easily be corrected at this time rather than waiting to have a complaint from the customer.
   5. Prices must be correct and in a column for easy addition.
   6. No ticket is to be placed on the cook's wheel without a price. (This enables a double check by the cook to insure correct prices.)

B. Timing procedures for check presentation
   1. Dessert items must be suggested and served before totaling guest check.
   2. Refill coffee cup and water glass; then ask if anything else is desired.
   3. Compute tax and add the ticket away from the guest. A waitress station out of view of the customer is recommended.
   4. Do not keep the guest waiting for his check.
   5. Place guest check face down on table to the right of the customer.
   6. Thank customer and ask him to return. You might add "It has been a pleasure serving you."

C. Be prepared to answer any questions guests may have concerning charges on check
   1. Know your menu prices without having to refer to the menu.
   2. Be able to explain if there has been an additional charge for special requests.
   3. Be able to explain why no substitutions are allowed.

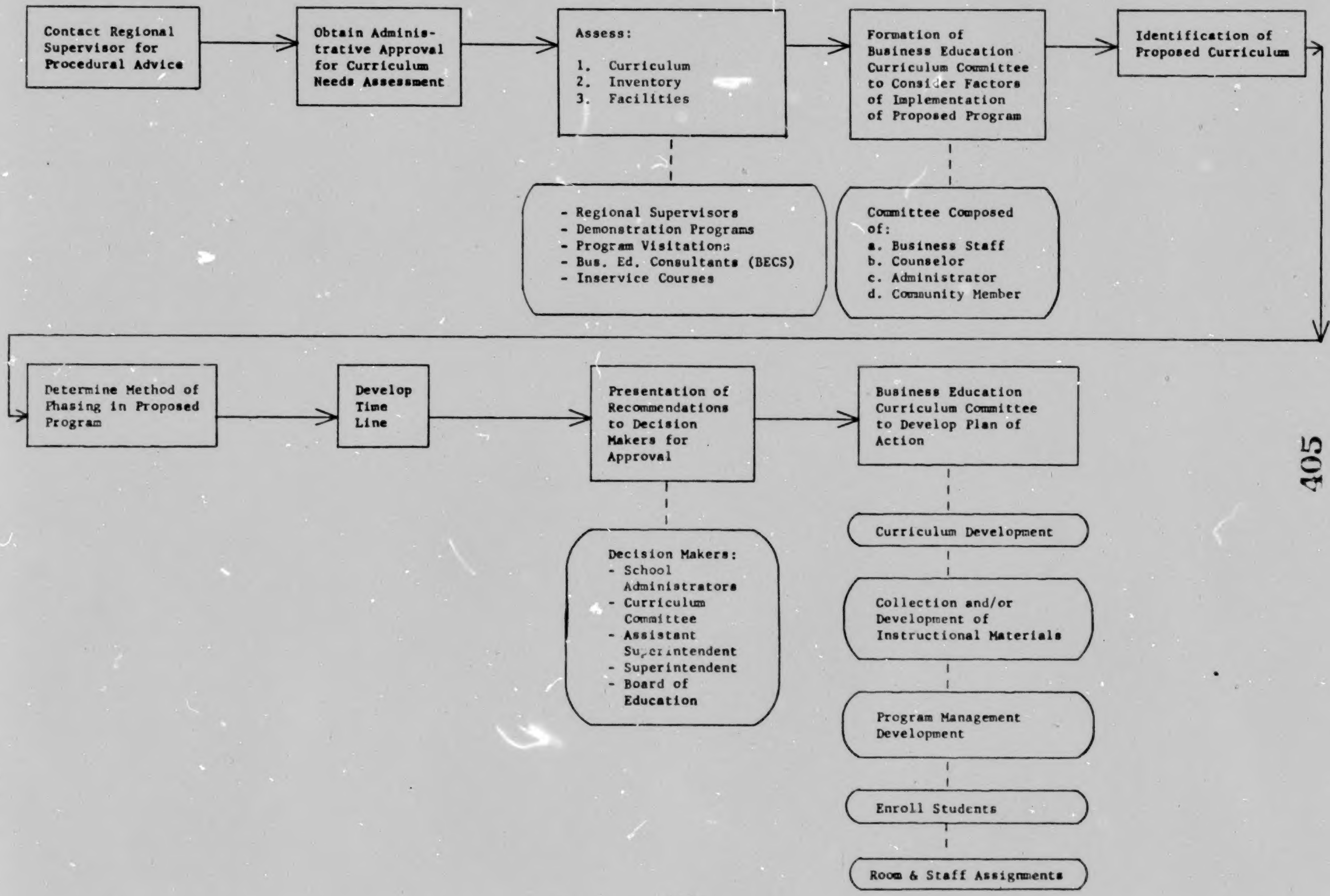
D. End of shift duties concerning guest checks
   1. House rules
      a. Explain importance of keeping tickets in numerical order.

E. Parts of a guest check
   1. The top portion of each guest check must be completed to identify the server, which table is being served and which guest you are serving.
   2. Tax is computed at 6% on the dollar. A sales tax chart is available at the cash register stand if there is a problem figuring the percentage.
   3. The total is to be placed at the bottom of the ticket. This will give the appearance of a neat ticket and can be easily read by the customer. Do not put total in middle of check.
   4. If the customer would like a receipt for tax purposes, the bottom of the check can be separated from the ticket and used as a receipt.
   5. If a mistake is made, cross out with a single line.

IMPLEMENTATION

Step-by-Step Procedure
Methods of Implementation
Record Keeping System
Certification of Students
Publicizing the Program
Student Aide Assistance
Paid Instructional Aide Assistance
Worksheets for Planning

STEP-BY-STEP PROCEDURE FOR IMPLEMENTATION


Contact Regional Supervisor for Procedural Advice
Obtain Administrative Approval for Curriculum Needs Assessment
Assess:
1. Curriculum
2. Inventory
3. Facilities
- Regional Supervisors
- Demonstration Programs
- Program Visitations
- Bus. Ed. Consultants (BECS)
- Inservice Courses
Formation of Business Education Curriculum Committee to Consider Factors of Implementation of Proposed Program
Committee Composed of:
a. Business Staff
b. Counselor
c. Administrator
d. Community Member
Identification of Proposed Curriculum
Determine Method of Phasing in Proposed Program
Develop Time Line
Presentation of Recommendations to Decision Makers for Approval
Decision Makers:
- School Administrators
- Curriculum Committee
- Assistant Superintendent
- Superintendent
- Board of Education
Business Education Curriculum Committee to Develop Plan of Action
Curriculum Development
Collection and/or Development of Instructional Materials
Program Management Development
Enroll Students
Room & Staff Assignments

METHODS OF IMPLEMENTATION

The transition from a subject approach to a competency approach in business education is possible in any size school. The program was designed so it could be adapted to both modular and lock-step scheduling in day, evening, secondary, post-secondary or adult schools. Implementation of the California Business Education Program Guide for Office and Distributive Occupations means that students who have not been able to take a full business program in the past will be able to achieve employability upon high school graduation because there will be opportunity to concentrate on entry-level job skills.

When considering the change, some basic factors that will determine the ease of integrating a competency curriculum into the school are: (1) The willingness of administrators and school boards to accept the concept of an individually prescribed approach to learning which may require shifting the department's budgeting priorities; (2) the willingness of the teachers to accept the concept of performance objectives, to develop instructional guides, to assume additional recording and guidance responsibilities, and to update standards and strategies; and (3) the availability of facilities, equipment and supplies.

Alternatives of implementing a competency curriculum are suggested as follows:

The Phase-In Method

Integrate the common core competencies (first year).
Integrate distributive education core and office core competencies (second year).
Integrate the specialty competencies (third year).

or

Assign only incoming ninth graders to program (first year).
Assign ninth and tenth graders to program (second year).
Assign ninth, tenth and eleventh graders to program - or all classes if change seems to be working smoothly (third year).

The Phase-Out Method

Separate course titles; i.e., bookkeeping, office practice, retailing, typing, et al., can be eliminated and replaced with a common title. Titles that might be considered are: Office Education Iab, IIab, IIIab, IVab, and Distributive Education Iab, IIab; Business I, II, III and IV or Business Careers I, II, III, IV. The completion of each of these would indicate a year's work in the competencies of the occupational choice; however, certificates of proficiency would be needed to indicate level of competency for specific jobs. The use of a common title allows the business teacher to program students within the business career education program and prescribe the order of study.

The California Business Education Program Guide for Office and Distributive Occupations may be initiated at any segment of the program model. The following optional approaches illustrate various methods of implementation which have been used.

OPTIONAL APPROACHES TO IMPLEMENTATION

PHASE-IN BY TRADITIONAL CURRICULUM

Code: CC = Common Core OC = Office Core CT = Clerk Typist GOC = General Office Clerk S = Steno

GENERAL BUSINESS

CC - Handwriting
CC - Instructions
CC - Sorting, Checking, Verifying
CC - Spelling
CC - Telephone
CC - Grooming
CC - Working with People

TYPING I

OC - Typing
OC - Written Communication
OC - Duplicating
OC - Spelling
OC - Mail

BUSINESS MATH

CC - Math
CC - Simple Business Records
CC - References, Manuals,
 Directories, Catalogs
CC - Adding Machine
CC - Making Change

BOOKKEEPING I

OC - Petty Cash
OC - Filing and Retrieving
OC - Data Processing
OC - Working with People

TYPING II

CT - Typing
CT - Spelling

BOOKKEEPING

GOC - Simple Business Records

OFFICE PRACTICE

GOC - Telephone
GOC - Adding Machine
GOC - References, Manuals,
 Directories, Catalogs
GOC - Filing and Retrieving
GOC - Mail

SHORTHAND I

CT - Spelling
S - Spelling
S - Transcribing

BUSINESS ENGLISH

S - Written Communication

PHASE-IN BY COMPETENCY CATEGORIES

A. COMPUTATION

Adding Machine
Data Process
Making Change
Mathematics
Sort, Check, Verify

Competencies Absorbed in A, B, and C

Simple Business Records
References, Manuals
Handwriting

B. EMPLOYABILITY

Grooming
Job Application
Work With People

C. COMMUNICATION

Oral, Written
Instructions
Spelling
Telephone

One reason or another may prevent a department from accomplishing all that had been intended in implementing a total program. Then, consider an alternative method of moving into the new program.

PHASE-IN BY GRADE LEVEL

Year	Present Program	Proposed Program
1	10, 11 & 12	9
2	11 & 12	9 & 10
3	12	9, 10 & 11
4	0	9, 10, 11 & 12

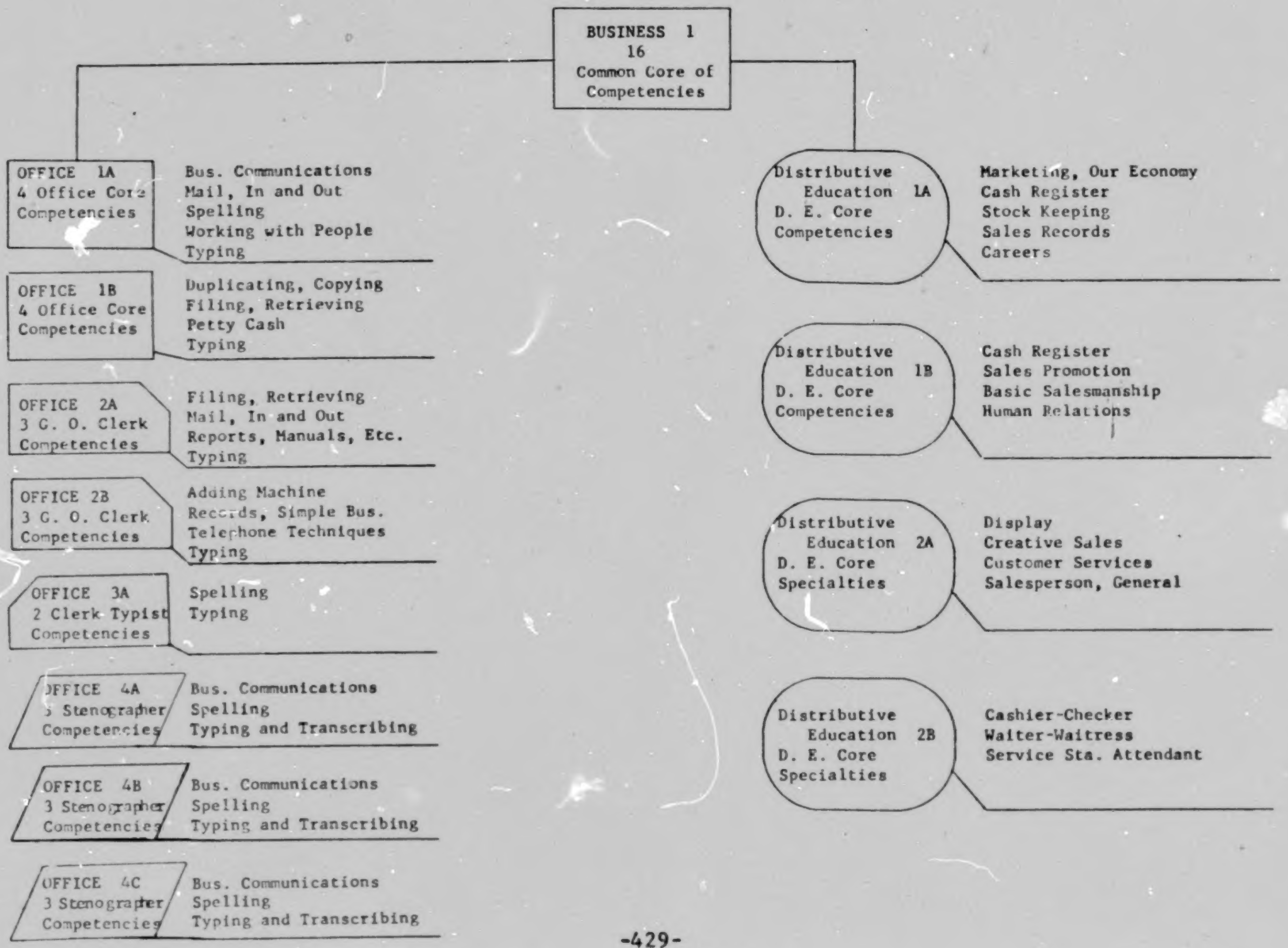
PHASE-IN MAJOR CORES BY YEARS

Year	Present Program	Proposed Program
1	Partially Retain	Common Core and Office DE Core only
2	Partially Retain	Office Specialties and DE Specialties
3	0	Include all levels of competencies

PHASE-OUT BY COMPETENCIES
(Transition into Office Education and Distributive Education Competency-Oriented Curriculum from a Traditional Course-Oriented Curriculum)

SAMPLE SETTING:
Large High School: 1,750 enrollment,
5-6 teachers, 140 students per teacher,
6 period day, 5 preparations per teacher.

One Semester Courses:



Schedules. Within a traditional schedule, instructional units may be worked around a rotation plan or the instructional plan can be offered within the framework of a particular job. Time constraints could be placed upon the work a student completes. In a modular schedule, students would be assigned open labs according to the intensity of interest in the program (exploration level to specialist level) and proceed at their own pace.

Credits. In traditional programs, the student was usually granted 5 credits per semester (87-90 days) for one period per day. Some schools also allowed quarter credit. However, schools now are finding that using variable credit gives the flexibility needed for a credit policy when implementing an individualized learning system.

A formula that could be used for converting the traditional 5 semester credits into variable credits would be: 1 unit = 14-16 hours of work = 3 weeks of class = 1 period per day. Even the traditional units of instruction could be assigned variable credit within a traditional program. This is usually a transitional step (semi-variable credit) for moving from traditional to full variable credit for competencies earned.

Full variable credit would allow the student to work at his own pace, faster or slower than others, and receive credit. For example, if he could complete 1 unit of work in 8 days, he would receive 1 unit of credit at that time. Or he could challenge the competency and, if successful, receive credit without working through the module. Under a system of full variable credit, each competency module must be assigned unit value (or partial unit). A student receives the units of credit when the competency has been successfully completed.

Transition from traditional to variable credit policy may be accomplished as follows:

Traditional Credit
Maximum 5 units per semester = 5 units per semester
↓
Variable Credit (transition)
Maximum 5 units per semester = 1 unit = 15 hours = 3 weeks
↓
Variable Credit
Same quantity of work as above = (More or less than) 15 hours = 3 weeks or challenge
No maximum, No minimum

Grades. Several factors can be used to determine grades as follows:

1. The quality of work.
2. The quality of the work and time for completion.
3. Certificates earned or competencies completed.

The competency approach to grading has been implemented in several ways. The options are many. The competency approach is adaptable to a traditional or flexible setting and may be reached by long-range or immediate change as illustrated:

COMPETENCY = TRADITIONAL = TIME LIMITS STRESSED
COMPETENCY = NON-TRADITIONAL = PERFORMANCE LIMITS STRESSED

TRADITIONAL GRADES = QUALITY + QUANTITY + TIME =
(A, B, C, No Mark
(A, B, C, D, No Mark
(A, B, C, D, Fail
(Pass/Fail
(Pass/Recycle/Fail/No Mark
(Credit/No Credit
(Completion of Competency
(Challenge Competency

COMPETENCY GRADES = Quality* ---or--- Challenge =
(Pass/Recycle
(Pass/Fail
(Credit/No Credit
(Traditional Grading

*Time may be considered a factor.

Materials. Self-instructional packages (learning activity packages or multimedia learning modules) provide an environment in which individualization can take place. Ideally, the student may take as much or as little time as he needs to complete his work or repeat his work; however, target dates tend to keep students from dawdling. Tutorial assistance may be provided by other students or instructional aides. The instructor plans the student's program, diagnoses problems, selects appropriate materials, and adapts the teaching style to the particular needs of the student.

SUGGESTED CHECK LIST FOR IMPLEMENTING ACTIVITIES

Sample Time Line for Planning Year

FIRST YEAR

October - December	Prepare budget analysis for first year and project requests for second year.
	Visit schools presently involved in this type of program and/or demonstration programs.
	Decide on credit and grading policies.
	Determine title designations for the skill classes.
	Request materials on identified skill and competencies from BEDDS.
	Determine a priority list for the writing and assembling of instructional materials for learning units.
	Determine responsibility for specific units.
	Determine information to be recorded for students and the form to be used. (Copy deadline January 1.)
	Develop promotional materials. These materials to be presented to counselors, parents, and students.
February	Complete the printing of student record forms by February 15.
	Prepare rough drafts of first units of instructional materials.
	Review and critique those materials completed.
	Determine supplies, materials, equipment needs for the following school year.
	Begin promotional activities.

SUGGESTED CHECK LIST FOR IMPLEMENTING ACTIVITIES

FIRST YEAR (continued)

March	Select students who are to be used as student aides.
	Duplicate instructional units (Learning Activity Packages).
	Continue to develop more instructional materials.
	Visit other schools presently involved in the program concept.
	Develop control system for handling of equipment, materials, texts, and supplies.
April	Set up schedule for registering students in the school as well as feeder schools.
	Continue to complete instructional units.
	Submit purchase orders for supplies, materials, textbooks, equipment and facility renovation.
	Finalize the projected budget.
May	Duplicate completed instructional units.
	Determine and assign staff members to the writing and assembling of instructional materials during the summer. Determine dates for completion.
	Assign student aides to teachers for September.
	Complete review of procedures to be followed in the fall, in regard to room assignment, skill responsibility, status of the development of AV materials, assignment of equipment to rooms, and review of recommended physical changes or alternatives if request changes are not possible.
	Make staff assignment as to room and course (typing, shorthand, model office, duplicating) teacher aides; business skills or competencies.
June-July	Write and develop materials.
	Receive, assemble and store all materials previously ordered.

SUGGESTED TIME LINE FOR FIRST YEAR OF PLANNING

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	March	April	May	June	July	Aug.
1. Phase-In Program Model												
2. Adapt existing facility layout, equipment and furniture to new program							—	—	—	—	—	—
3. Assemble and evaluate existing instructional multimedia materials and prepare strategies	—	—	—	—								
4. Establish budget priority							—	—	—			
5. Schedule inservice training, demonstration and consultations	—	—	—	—	—	—	—	—	—	—	—	—
6. Select and develop instructional multimedia strategies and material	—	—	—	—	—	—	—	—	—	—		
7. Determine staffing needs (teachers and aides)								—	—	—		
8. Publicize program - school - community					—	—	—	—	—			
9. Schedule students and select aides for comming semester								—	—			
10. Set up methods to reassess attitudes after program is initiated (student, teacher, administration)	(2nd year) —	—										
11. Develop alternatives for anticipated work flow and recording difficulties									—	—		

RECORD KEEPING SYSTEM

Records. At the heart of any individualized and continuous progress system is the method used for record keeping. Proper maintenance of a simple set of student information records is necessary for at least four years, since the student may desire to complete a competency at some other time. The records may be kept longer as a basis for employment recommendations.

Student Progress. Students will need to be monitored as they complete individual or groups of performance objectives. A master record is necessary. A student will not necessarily progress systematically within a core of competencies because of variations in each student's ability; availability of learning activity materials or equipment; illness or absence; as well as an open entry-exit policy. Students may also transfer in from other schools; and their previous training may overlap two or more cores, yet the individual core training may not be complete.

Clerical Assistance. The maintenance of up-to-date record keeping of student progress is an integral part of individual programming. The additional record keeping requires that assistance be provided for the teacher.

Program Monitoring. In addition to records of progress, keep records of student which may be helpful in counseling student. Since the employment opportunities for high school graduates vary among areas, the information needed on students may be different; however, the following points are suggested as being desirable for all students:

1. Name of student
2. Grade level
3. Vocational goal
4. Competency units in progress
5. Competency units completed
6. Work record (paid, unpaid, volunteer)
7. Certificates issued
8. Skill level attained
9. References
10. Evaluation of personal characteristics
11. Instructors' comments
12. Follow-up record

Teachers must be able to maintain initial records easily, accurately, and within minimal time limits. They must also be able to transfer initial records to permanent ones just as easily. A system can be designed that will effectively combine a minimum of time, effort, and cost. Record keeping must not become the nemesis of managing the program.

Some of the qualities which are desirable for such records follow:

1. Easily understood by students, parents, counselors, and teachers
2. Relate student achievement to ability
3. Allow for continuous diagnosis and prescription
4. Easy to record information
5. Glance at a single record and know what has occurred to date
6. Identify all students who need to work on a specific objective
7. Show the student what progress has been made toward entry-level employment skills

Several options are available to accomplish the goal of a useful record keeping system. A student card or folder is one option. Another is the adaptation of a commercial data retrieving system. A school may develop its own system which could be computerized if time and equipment were available.

CERTIFICATION OF STUDENTS

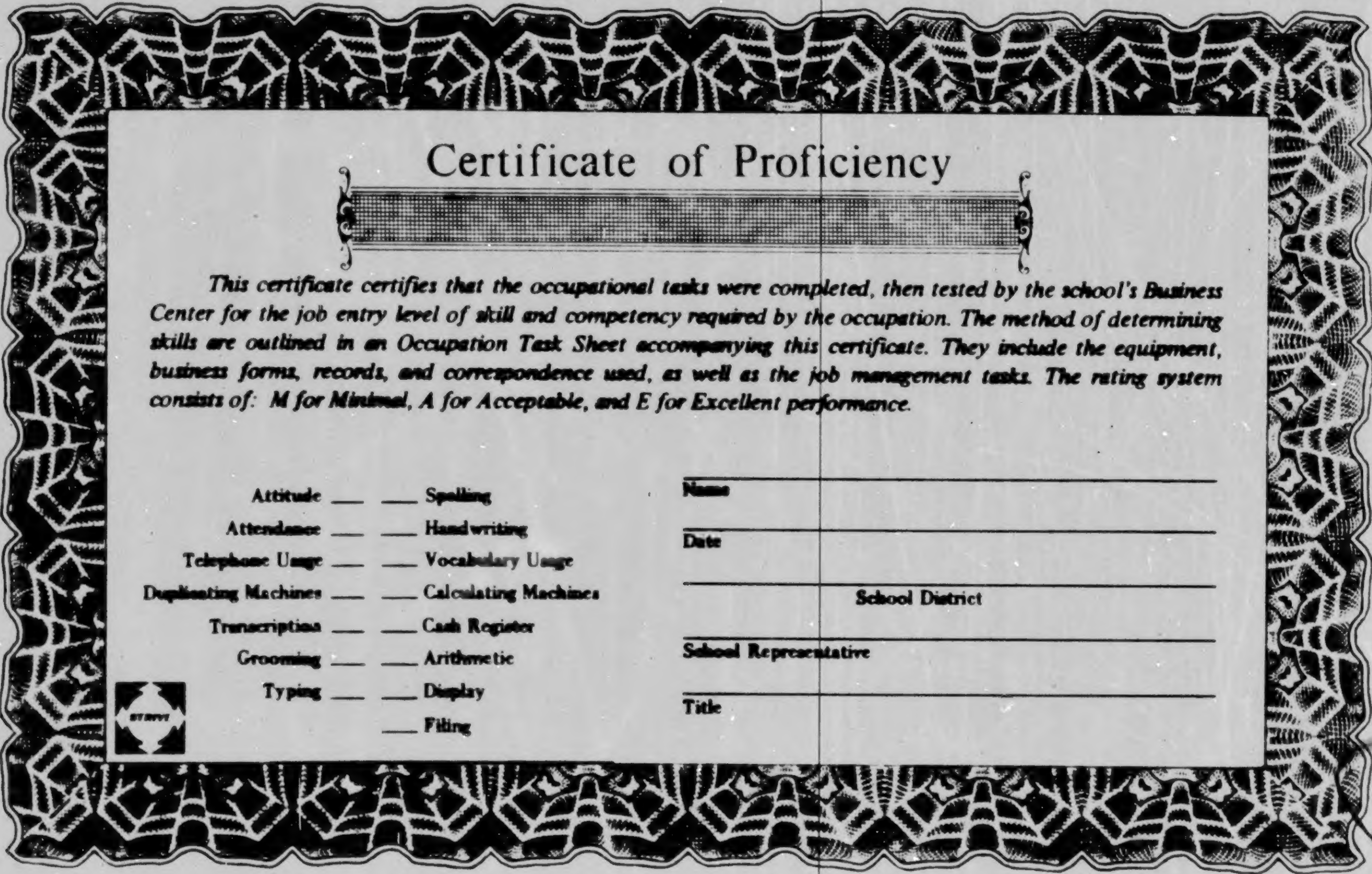
Certifying the occupations of general office clerk, clerk-typist, stenographer, checker-cashier, salesperson--general, service station attendant, and waiter-waitress encourages and develops a goal-oriented incentive for the student entering the program. From the employer's point of view, certification establishes the job proficiency of a prospective employee at the time of issuance.

Certificates for these occupations should be issued only to students who have completed all of the competencies for that occupation. If performance less than this is accepted, the certificate loses its value in the eyes of the student as well as the employer. It is also suggested that certificates be stamped with the school seal and distributed at an awards assembly, or with diplomas to add to the prestige associated with receiving one.

Some students will not be able to meet all competencies leading to the completion of the seven occupations included in the program guide. Teachers may want to certify these students for other occupations, such as messenger, calculating machine operator, file clerk, telephone operator, receptionist, bookkeeper, shipping clerk, and sign press operator.

Before establishing a certificate for occupations not included in this guide, the teacher should obtain information on job requirements and job descriptions as a basis for writing additional objectives and competencies needed.

Remember: The certificate must be certification of student skills, not an identification of business courses he has completed. Sample certificates follow.



Certificate of Proficiency

This certificate certifies that the occupational tasks were completed, then tested by the school's Business Center for the job entry level of skill and competency required by the occupation. The method of determining skills are outlined in an Occupation Task Sheet accompanying this certificate. They include the equipment, business forms, records, and correspondence used, as well as the job management tasks. The rating system consists of: M for Minimal, A for Acceptable, and E for Excellent performance.

Attitude ___ ___ **Spelling**
Attendance ___ ___ **Handwriting**
Telephone Usage ___ ___ **Vocabulary Usage**
Duplicating Machines ___ ___ **Calculating Machines**
Transcriptions ___ ___ **Cash Register**
Grooming ___ ___ **Arithmetic**
Typing ___ ___ **Display**
___ **Filing**

Name ______________________
Date ______________________
______________________ **School District**
School Representative ______________________
Title ______________________

UNIFIED SCHOOL DISTRICT

Certificate

This is to certify that

Has successfully completed a training program for

and has demonstrated competence in the skills
listed on the reverse side of this certificate.

Completion Date

School

Instructor

THE STUDENT NAMED ON THIS AWARD HAS
QUALIFIED FOR CERTIFICATION AS A BY:

DATE CERTIFIED

_______________ Using correctly, in conversation, basic filing terms

_______________ Filing alphabetically, numerically, and geographically

_______________ Taking everyday care of equipment

_______________ Maintaining a neat working area and conserving supplies

_______________ Planning and organizing work for self and other students

_______________ Maintaining regular attendance

_______________ Under working conditions, displaying the disposition and attitudes that employers have indicated are necessary for success in office work

_______________ Passing a final examination with a minimum of ___________% accuracy

PUBLICIZING THE PROGRAM

Promoting the program in an individual school or district may vary greatly, depending upon the size of school, geographic location, availability of equipment, supplies, sources for publicity, and talent of individual business department staff members. The following outline contains a few ideas for discussion and possible inclusion in a promotion program.

WHO?--needs to know

Teachers, administrators, counselors, work experience coordinators, students, employers, parents, feeder schools, PTA, chamber of commerce, service clubs, business advisory councils, and school board members.

WHAT?--can be used

Brochures, flyers, newspaper releases, department and school newsletters, posters, circulars, handbooks, radio, TV, slide/tape/transparencies, bulletin boards, speakers, certificates and awards, presentations, testimonials, visitations, and youth group activities.

WHERE?--can it be used

Career centers, library, chamber of commerce office, insert in district mailings, school display areas, HRD, office bulletin board, PTA meetings, feeder school assemblies, awards assembly, classroom, faculty meetings, service club meetings.

WHEN?--should it be done

During preregistration, vocational education week, career day, preterm faculty meetings; regular press coverage (including pictures), regular departmental news releases, faculty bulletin announcements, student bulletin announcements; back-to-school night, school board meetings (regular or special), prior to eighth grade preregistration; each time a new program is introduced, when major changes are made in existing program, and student successes to be publicized immediately. (Make appointments with service clubs early in year.)

HOW?--can it be done

- Ask the art and journalism departments to assist in developing posters, flyers, etc. Elaborate posters, etc., are not necessary.
- Take action pictures (slides, film, or videotape) of all phases of department--develop script and dictate tape to accompany slides and film.
- Contact district public relations officer for local news media coverage or write press releases for distribution. Contact local news media for format and deadlines. Invite news media to special functions and presentations.
- Evaluate promotional material at least every semester.

PUBLICIZING THE PROGRAM

HOW?--can it be done (continued)

- Develop brochures
    - 1-page promotional material, attractive, eye catching, fast overview of program (or a specific part of program)
    - 2 or more pages--more descriptive of program and offerings
- Presentations
    - Slide/tape, film, videotape, handouts, and oral presentations to students in the program, feeder schools, community groups, and school board
    - Graduates (former students) make presentations to students in the program
- Visitations
    - Have eighth graders from feeder schools tour department utilizing business students as tour guides (FBLA or DECA members, for example)
    - Encourage parent and employer visitations when program is in operation as well as during back-to-school nights and vocational education week. Encourage questions and/or suggestions on program
    - Intradistrict tours between high schools
    - Conduct tours and explanations of program for counselors, staff members, and administrators
- Provide inservice training for teachers, counselors, and administrators
- Keep all material up to date

STUDENT AIDE ASSISTANCE

To prevent the clerical tasks involved in administering individualized learning from becoming overwhelming, teachers may include student aides in their program. Two or three student aides per period are often utilized because individually prescribed instruction increases the need for:

1. Record keeping
2. Keeping records consistently current
3. Variety of assignments
4. Activities which require typing, duplicating and filing to support the program
5. Time to work individually with each student
6. Immediately handling testing routines and student questions
7. Distributing and receiving materials and assignments

A sample job description for student aide position follows:

JOB DESCRIPTION: STUDENT AIDE

DEFINITION:

Under general supervision of the teacher/paraprofessional performs a variety of clerical and related tasks.

EXAMPLES OF DUTIES:

Types and duplicates tests and other related work; scores objective tests and assignments; records test results; under supervision, provides direct assistance to students; inventories materials, equipment; helps maintain and report on attendance records; makes telephone calls; issues instructional materials.

DESIRABLE QUALIFICATIONS:

Knowledge of:

General office and distributive education classroom procedures

Ability to:

- Type accurately
- Use duplicating machines
- Perform basic arithmetic computation
- Understand and execute written and oral directions
- Work with and take directions from the teacher
- Work congenially with teenagers in a classroom situation
- Elicit respect from peers

Credit:

May receive credit toward graduation
Work term: Preferred - 1 year; acceptable - 1 semester

PAID INSTRUCTIONAL AIDE ASSISTANCE

According to the California Education Code, 1971, Section 2, p. 937, an instructional aide is a person who assists classroom teachers and other certificated personnel in the performance of their duties, in the supervision of pupils and in instructional tasks which, in the judgment of the certificated personnel to whom the instructional aide is assigned, may be performed by a person not licensed as a classroom teacher. Instructional aides do not assign grades.

Several researchers have found that the teaching task was made more manageable by the assignment of clerical and routine tasks to aides. There was general agreement among professional educators that diagnosing, planning, and assigning, should be reserved for the professional; that is, the teacher should do the management of the teaching assignment. Problems encountered in the utilization of aides have centered primarily on the need for both orientation and inservice training programs, for policies regarding teacher and aide responsibilities, and definition of roles.

Most authors of surveys, studies, projects, and dissertations on the utilization of paid instructional aides conducted during the 1960-1970 period concurred in the conclusion that the use of paraprofessionals was helpful to the school situation. No study concluded that the use of aides had a negative effect. Most advocates of reorganization of staffing patterns recognized the complexity of the tasks in education as requiring change. The idea that aides contributed to productivity was prevalent in most studies. Teacher efficiency was increased; more small-group and individualized instruction were found where aides were used; educational programs were enriched; and in one study at the secondary level, fiscal savings accrued with a concurrent increase in the number of adults per student.

In a 1962 NASSP survey the following duties of aides were reported: (a) performing clerical work, (b) supervising pupils in noninstructional activities, (c) reading pupil compositions, and (d) providing remedial instruction for individuals and small groups. The California portion of the survey covered 514 junior and senior high schools and showed the use of noncertified aides had not been adopted as a panacea nor as a set pattern, but rather within the general concept of finding improved ways to redeploy staff and students for better instruction. Aides were cited as doing clerical and routine jobs such as correcting tests, arranging field trips, proctoring examinations, supervising study, keeping records, making out report cards, enrolling new students, preparing study guides and transparencies, and if qualified doing research on instructional topics. In a 1965 study at Peabody College, evidence showed that adequate numbers of clerical staff workers were more important than was suspected.

During the school year 1966-67, every school district in California was polled by the Research Department of CTA and the California Association of School Administrators[1] to ascertain whether teacher aides were being used. Of the 1,204 school districts in California, more than one-third reported having aides--a total of 10,992 aides. Thirty-seven duties were reported. Some which would be applicable to schools using the Guide are as follows:

Duplicating tests and other materials
Typing class materials
Correcting tests, workbooks, and homework

Tutoring individual students
Escorting pupils on field trips
Tutoring small groups of students
Operating audio-visual equipment
Managing bulletin boards
Recording data in student files
Assisting in library
Ordering audio-visual equipment from materials center
Ordering supplies
Administering teacher-made tests and machine-scored tests
Entering grades on report cards
Mechanical scoring
Preparing attendance reports
Assisting in laboratories

Administrators, aides, students, and teachers in California Community colleges identified nineteen tasks as being appropriate for instructional aides to perform.[2] By task category these were as follows:

1. Clerical
   Ordering, checking out, returning, storing and attending to equipment and supplies
   Keeping files of instructional materials
   Keeping inventory of equipment
   Duplicating tests and other materials
   Keeping attendance records
2. Working with Students
   Assisting students in the laboratory
   Tutoring individual students
   Working with small groups of students
   Serving as a resource person
   Demonstrating skills in a specific subject area
   Supervising student groups/student makeup
   Assisting students in preparation of assignments
   Assisting students in the library
3. Testing, Scoring, and Grading
   Correcting objective-type tests
   Scoring and graphing teacher-made tests

PAID INSTRUCTIONAL AIDE ASSISTANCE

4. *Materials and Data Preparation*
   Locating instructional materials
   Arranging materials for classes
   Preparing graphics, projectuals, tapes, and other media
   Operating audio-visual equipment

In conclusion, the use of instructional aides would be helpful in administering the program described in the *California Business Education Program Guide for Office and Distributive Occupations*.

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[1] CTA Research Bulletin No. 206, *Teacher Aides in California Schools and School Districts*.

[2] Lois A. Callahan, *Attitudes of Selected Groups Toward Utilization of Instructional Aides in California Community Colleges*, (unpublished dissertation) University of Southern California, 1973.

FACTORS TO BE CONSIDERED FOR IMPLEMENTATION

	Comments and Reflections
APPROACH • Total concept--"all the way" • Phase-in options	
CERTIFICATION • Competencies • Occupations	
CHALLENGING • System for challenging • Competency units • Credit • Grade	

CREDIT
• Credit for time--5 units each semester
• Traditional
• Per class period variable [illegible]ime
    • 15 class days equals [illegible]nit
    • 14-16 hours equals 1 unit
• Credit for work completed or challenged	

FUNDING OPTIONS • Part B, VEA • District • Misc. resources (donation of equipment, etc.)	

- Other ideas for each factor may be considered

WORKSHEET

BUSINESS EDUCATION CURRICULUM COMMITTEE

FACTORS TO BE CONSIDERED FOR IMPLEMENTATION

	Comments and Reflections
FACILITY LAYOUT • Rearrangement • Remodel	
GRADES • Quality • Time • Pass--no mark • A, B, C, no mark • Attitudes • Credit/no credit	
INDIVIDUALIZATION • LAPS • Multimedia • Large group--small group	
INVENTORY • Equipment - • Instructional materials	
INSERVICE • Concept orientation • School visitations • BEDDS • BECS	

- Other ideas for each factor may be considered

WORKSHEET

BUSINESS EDUCATION CURRICULUM COMMITTEE

FACTORS TO BE CONSIDERED FOR IMPLEMENTATION

	Comments and Reflections
INSTRUCTIONAL MATERIALS • Gathering • Evaluation	
INSTRUCTIONAL STRATEGIES AND IDEAS • Gathering • Evaluation	
OPEN ENTRY--OPEN EXIT • Within the department • Within the school	
PARAPROFESSIONALS • Individualization • Aide for maintaining records	
RECORDS • Continuous progress • Teacher counseling	
RELEASE TIME/COMPENSATION FOR ADDITIONAL WORK TIME • Evaluation of materials • Visitations • Writing/development of materials • Summer	

- Other ideas for each factor may be considered

WORKSHEET

BUSINESS EDUCATION CURRICULUM COMMITTEE

FACTORS TO BE CONSIDERED FOR IMPLEMENTATION

	Comments and Reflections
SCHEDULING • Traditional • Modular • Rotating • Variable time	
STAFF • Assignment by subject • Assignment by related subject areas • Assignment by physical plant area	

- Other ideas for each factor may be considered

WORKSHEET

CALIFORNIA BUSINESS EDUCATION PROGRAM MANAGEMENT

SUGGESTED EQUIPMENT INVENTORY FORM

	Room No.	Sta-tions
AUDIO		
Cassette Players		
Belt Transcribers		
Headphones (Steno)		
Recorders		
Record Players		
Tape Transcribers		
BASKETS		
Desk		
Waste		
BINDING EQUIPMENT		
CALCULATORS		
Electronic		
Printing		
Rotary		
Other		
CASH REGISTERS		
CHECKWRITER		
COLLATOR		
DATE STAMP		
DUPLICATORS		
Liquid Chemical		
Mimeograph		
Offset		
Stencil Maker		
Thermofax		
Xerox		

	Room No.	Sta-tions
FILE CABINETS		
Standard		
Legal		
Card		
Stencil		
MIMEOSCOPE		
NUMBERING STAMP		
PAPER CUTTERS		
PAPER HOLE PUNCH		
PAPER JOGGERS		
PENCIL SHARPENERS		
PROJECTORS		
Overhead		
Film		
Filmstrip		
Skill Builder		
Slide Record		
Slide Cassette		
SCREEN		
Wall		
Portable		
SCALES		
Postage		
Food		
SOAP DISPENSER		

	Room No.	Sta-tions
STAPLERS		
Electric		
Manual		
SWITCHBOARD		
PBX		
Telephones		
TIMERS		
Interval		
Stop Watch		
Time Clock		
TOWEL DISPENSER		
TYPEWRITERS		
Manual		
Electric		
Specialty		
(MISCELLANEOUS)		

WORKSHEET

CALIFORNIA BUSINESS EDUCATION PROGRAM MANAGEMENT
SUGGESTED FACILITIES AND FURNITURE INVENTORY FORM

Room Size:______ft. x ______ft.   Room No.____   Stations_____

FACILITIES	NUMBER	FACILITIES	NUMBER	FURNITURE	NUMBER	FURNITURE	NUMBER
AUDIOVISUAL		FLOORS		BOOKCASE		PROJECTOR	
Curtains		Vinyl					
Screen		Carpet		CABINETS		RACKS	
Antenna (wall)				Supply		Book	
Television Plug		POWER TURN OFF		Books		Magazine	
						Timecard	
COMMUNICATIONS		SINKS		CHAIRS			
Telephone, Out				Molded Fiberglass		STANDS	
Telephone, In						Textbook	
Intercom				Wooden		Demonstration	
				Adjustable Posture		Podium	
CUPBOARDS							
Student/teacher				Secretarial (casters)		STUDY CARREL	
Reference books							
Materials						TRAYS	
Supplies				DESKS		Letter	
Full-wall				Bookkeeper		Slide	
Counter				Library/Tables			
Above counter				Teacher			
				Executive			
DOORS				Student			
Between rooms				Typewriter			
Solid				L-shape			
Window (half)				Miscellaneous			
Dutch							
				FOOTRESTS			
ELECTRIC OUTLETS							
Floor (wiring)				ORGANIZERS			
Subsurface				Desk top			
Subsurface (strip)				Sorting			

WORKSHEET

INSTRUCTIONAL MATERIALS

Code:

T = Textbook
WB = Workbook
ST = Supplementary Text
R = Reference

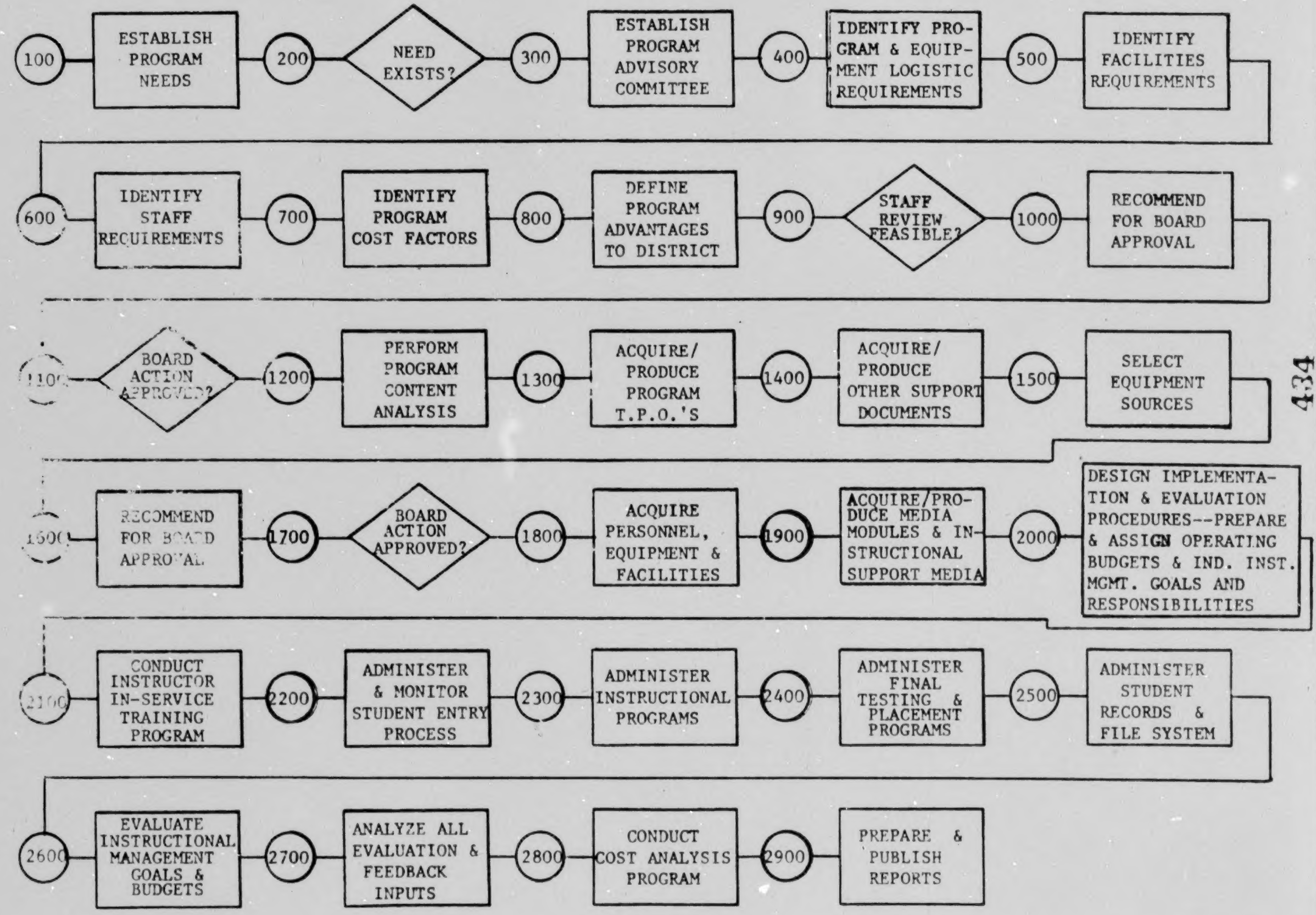
S = Slides
F = Films
Misc. = Miscellaneous
P = Periodicals

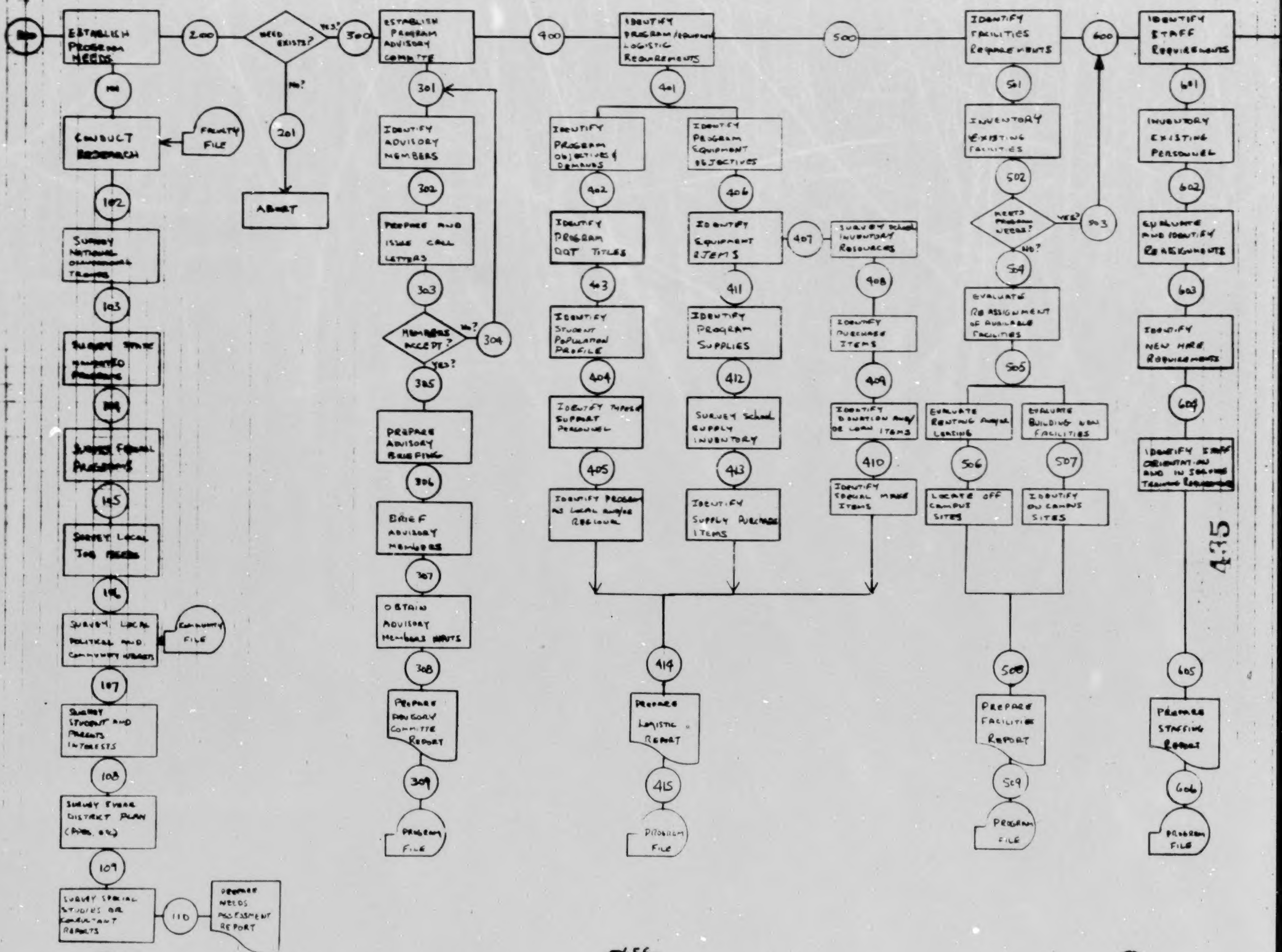
PT = Prepared Transparencies
C = Cassette Tapes
FS = Filmstrips

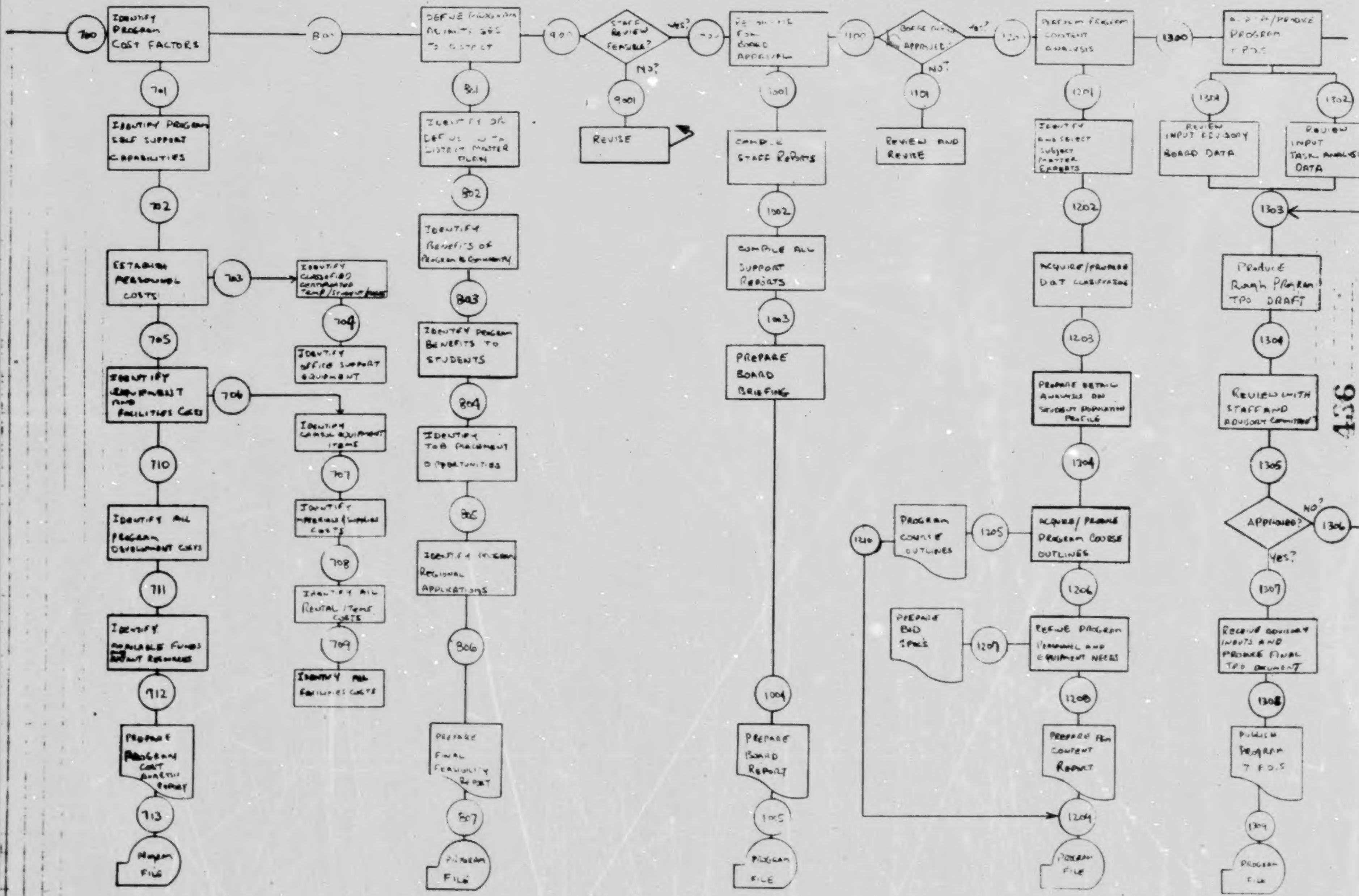
Title	Code	Edition	I.D. No.	On Hand

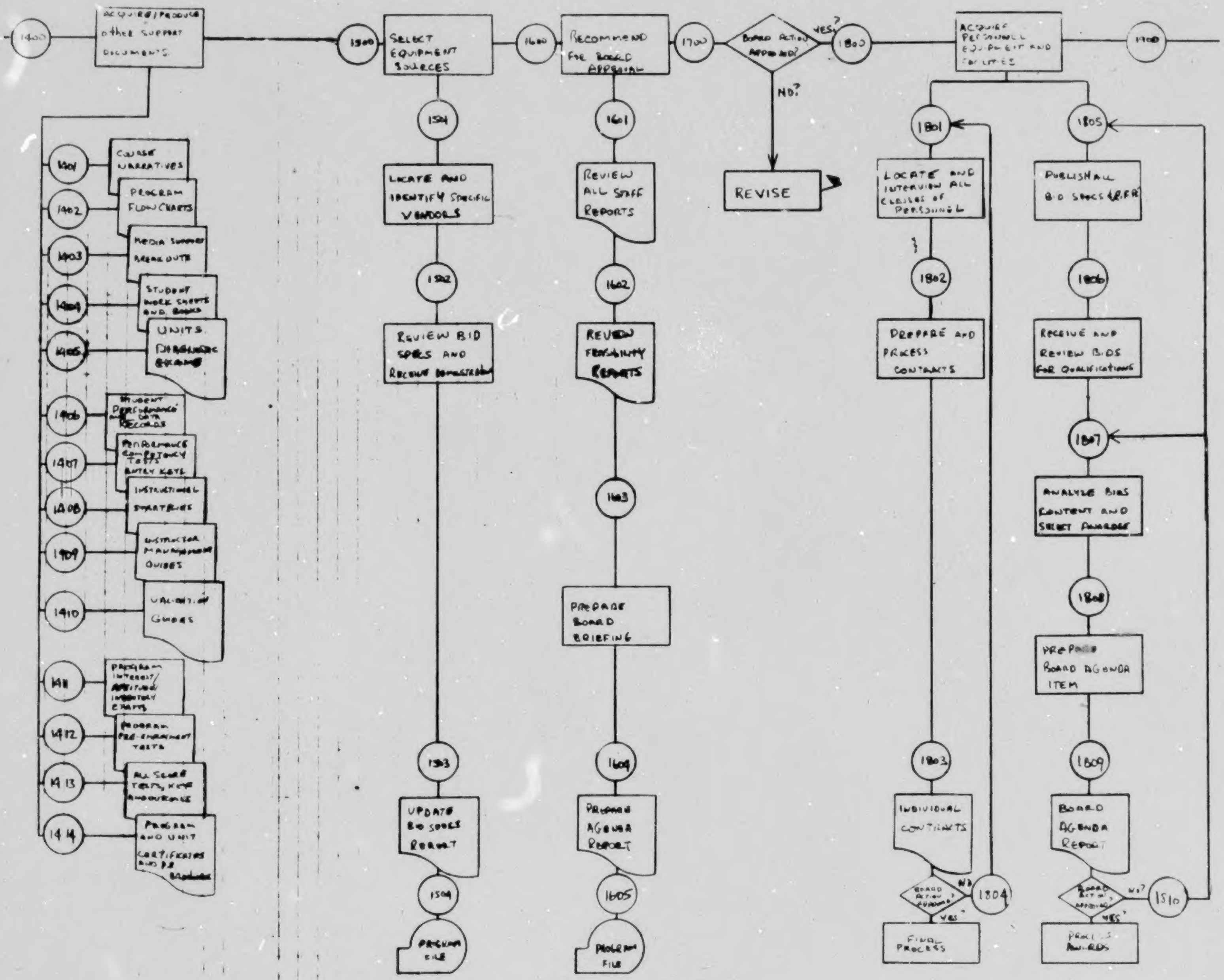
ADMINISTRATIVE SYSTEMS MODEL

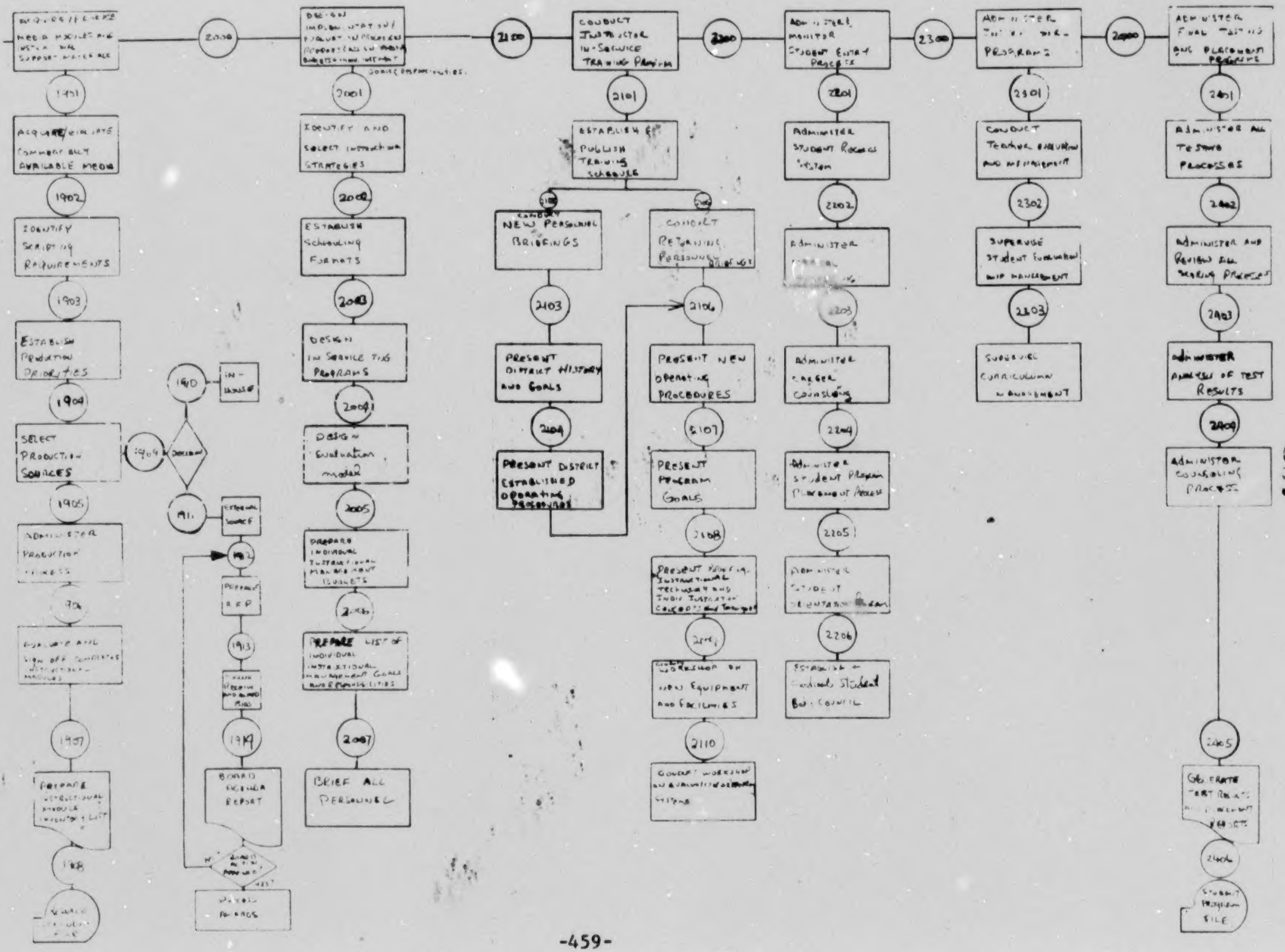
SYSTEMS MANAGEMENT ACTIVITY FLOW CHART - **SUMMARY**

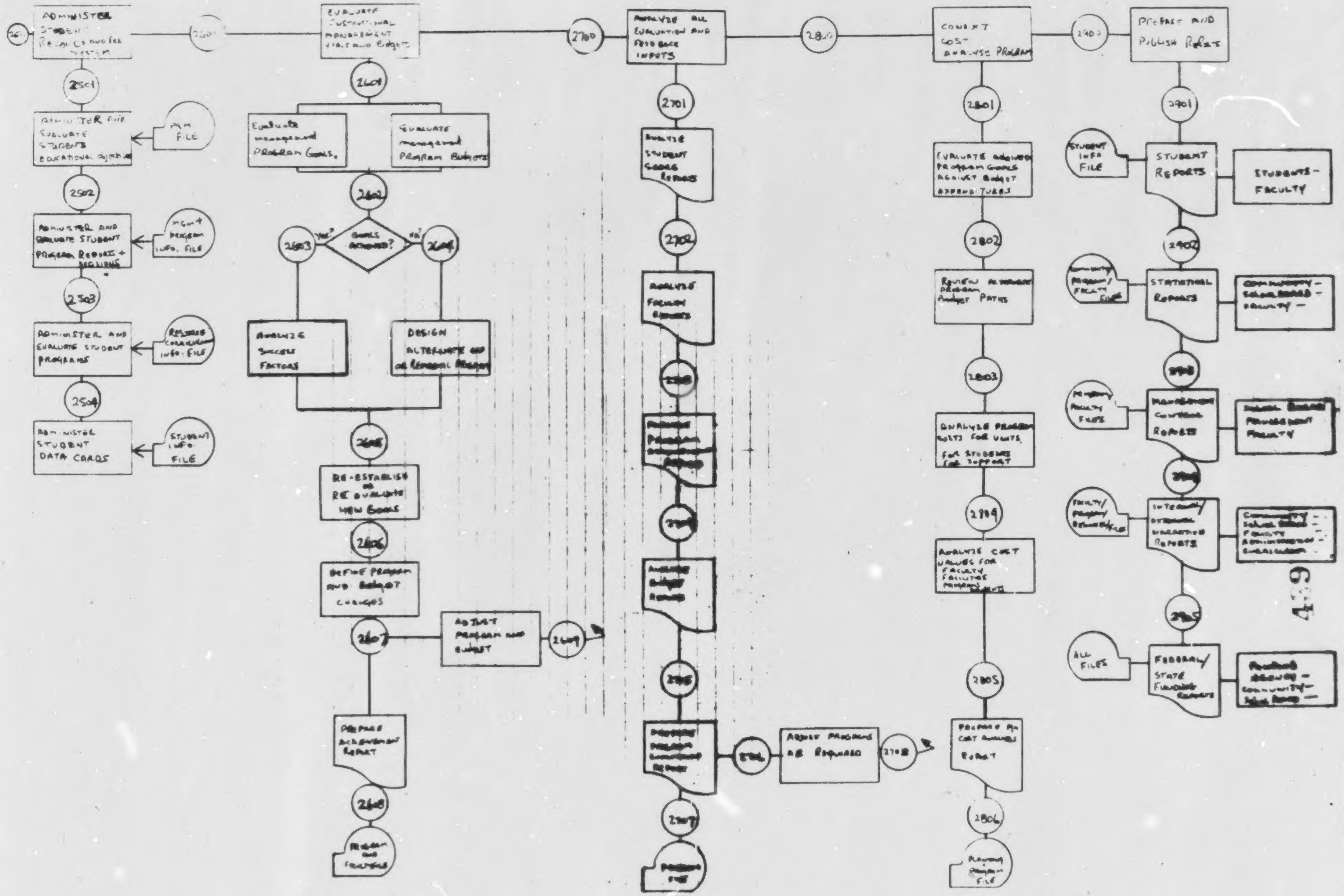

100
ESTABLISH PROGRAM NEEDS
200
NEED EXISTS?
300
ESTABLISH PROGRAM ADVISORY COMMITTEE
400
IDENTIFY PROGRAM & EQUIPMENT LOGISTIC REQUIREMENTS
500
IDENTIFY FACILITIES REQUIREMENTS
600
IDENTIFY STAFF REQUIREMENTS
700
IDENTIFY PROGRAM COST FACTORS
800
DEFINE PROGRAM ADVANTAGES TO DISTRICT
900
STAFF REVIEW FEASIBLE?
1000
RECOMMEND FOR BOARD APPROVAL
1100
BOARD ACTION APPROVED?
1200
PERFORM PROGRAM CONTENT ANALYSIS
1300
ACQUIRE/ PRODUCE PROGRAM T.P.O.'S
1400
ACQUIRE/ PRODUCE OTHER SUPPORT DOCUMENTS
1500
SELECT EQUIPMENT SOURCES
1600
RECOMMEND FOR BOARD APPROVAL
1700
BOARD ACTION APPROVED?
1800
ACQUIRE PERSONNEL, EQUIPMENT & FACILITIES
1900
ACQUIRE/PRODUCE MEDIA MODULES & INSTRUCTIONAL SUPPORT MEDIA
2000
DESIGN IMPLEMENTATION & EVALUATION PROCEDURES--PREPARE & ASSIGN OPERATING BUDGETS & IND. INST. MGMT. GOALS AND RESPONSIBILITIES
2100
CONDUCT INSTRUCTOR IN-SERVICE TRAINING PROGRAM
2200
ADMINISTER & MONITOR STUDENT ENTRY PROCESS
2300
ADMINISTER INSTRUCTIONAL PROGRAMS
2400
ADMINISTER FINAL TESTING & PLACEMENT PROGRAMS
2500
ADMINISTER STUDENT RECORDS & FILE SYSTEM
2600
EVALUATE INSTRUCTIONAL MANAGEMENT GOALS & BUDGETS
2700
ANALYZE ALL EVALUATION & FEEDBACK INPUTS
2800
CONDUCT COST ANALYSIS PROGRAM
2900
PREPARE & PUBLISH REPORTS


100
ESTABLISH PROGRAM NEEDS
101
CONDUCT RESEARCH
FACULTY FILE
102
SURVEY NATIONAL OCCUPATIONAL TRENDS
103
SURVEY STATE [illegible] PROGRAMS
104
SURVEY FEDERAL PROGRAMS
105
SURVEY LOCAL JOB NEEDS
106
SURVEY LOCAL POLITICAL AND COMMUNITY [illegible]
COMMUNITY FILE
107
SURVEY STUDENT AND PARENTS INTERESTS
108
SURVEY 5 YEAR DISTRICT PLAN (APPR. ETC)
109
SURVEY SPECIAL STUDIES OR CONSULTANT REPORTS
110
PREPARE NEEDS ASSESSMENT REPORT
200
NEED EXISTS?
YES?
NO?
201
ABORT
300
ESTABLISH PROGRAM ADVISORY COMMITTEE
301
IDENTIFY ADVISORY MEMBERS
302
PREPARE AND ISSUE CALL LETTERS
303
MEMBERS ACCEPT?
NO?
304
YES?
305
PREPARE ADVISORY BRIEFING
306
BRIEF ADVISORY MEMBERS
307
OBTAIN ADVISORY MEMBERS INPUTS
308
PREPARE ADVISORY COMMITTE REPORT
309
PROGRAM FILE
400
IDENTIFY PROGRAM/EQUIPMENT LOGISTIC REQUIREMENTS
401
IDENTIFY PROGRAM OBJECTIVES & DEMANDS
402
IDENTIFY PROGRAM DOT TITLES
403
IDENTIFY STUDENT POPULATION PROFILE
404
IDENTIFY TYPES OF SUPPORT PERSONNEL
405
IDENTIFY PROGRAM AS LOCAL AND/OR REGIONAL
IDENTIFY PROGRAM EQUIPMENT OBJECTIVES
406
IDENTIFY EQUIPMENT ITEMS
407
SURVEY SCHOOL INVENTORY RESOURCES
408
IDENTIFY PURCHASE ITEMS
409
IDENTIFY DONATION AND/OR LOAN ITEMS
410
IDENTIFY SPECIAL MAKE ITEMS
411
IDENTIFY PROGRAM SUPPLIES
412
SURVEY SCHOOL SUPPLY INVENTORY
413
IDENTIFY SUPPLY PURCHASE ITEMS
414
PREPARE LOGISTIC REPORT
415
PROGRAM FILE
500
IDENTIFY FACILITIES REQUIREMENTS
501
INVENTORY EXISTING FACILITIES
502
MEETS PROGRAM NEEDS?
YES?
503
NO?
504
EVALUATE REASSIGNMENT OF AVAILABLE FACILITIES
505
EVALUATE RENTING AND/OR LEASING
EVALUATE BUILDING NEW FACILITIES
506
507
LOCATE OFF CAMPUS SITES
IDENTIFY ON CAMPUS SITES
508
PREPARE FACILITIES REPORT
509
PROGRAM FILE
600
IDENTIFY STAFF REQUIREMENTS
601
INVENTORY EXISTING PERSONNEL
602
EVALUATE AND IDENTIFY REASSIGNMENTS
603
IDENTIFY NEW HIRE REQUIREMENTS
604
IDENTIFY STAFF ORIENTATION AND IN SERVICE TRAINING REQUIREMENTS
605
PREPARE STAFFING REPORT
606
PROGRAM FILE


700
IDENTIFY PROGRAM COST FACTORS
701
IDENTIFY PROGRAM SELF SUPPORT CAPABILITIES
702
ESTABLISH PERSONNEL COSTS
703
IDENTIFY CLASSIFIED CERTIFICATED TEMP/STUDENT
704
IDENTIFY OFFICE SUPPORT EQUIPMENT
705
IDENTIFY EQUIPMENT AND FACILITIES COSTS
706
IDENTIFY CAPITAL EQUIPMENT ITEMS
707
IDENTIFY MATERIALS & SUPPLIES COSTS
708
IDENTIFY ALL RENTAL ITEMS COSTS
709
IDENTIFY ALL FACILITIES COSTS
710
IDENTIFY ALL PROGRAM DEVELOPMENT COSTS
711
IDENTIFY AVAILABLE FUNDS GRANT RESOURCES
712
PREPARE PROGRAM COST ANALYSIS REPORT
713
PROGRAM FILE
800
DEFINE PROGRAM RELATIONSHIPS TO DISTRICT
801
IDENTIFY OR DEFINE WITH DISTRICT MASTER PLAN
802
IDENTIFY BENEFITS OF PROGRAM TO COMMUNITY
803
IDENTIFY PROGRAM BENEFITS TO STUDENTS
804
IDENTIFY JOB PLACEMENT OPPORTUNITIES
805
IDENTIFY PROGRAM REGIONAL APPLICATIONS
806
PREPARE FINAL FEASIBILITY REPORT
807
PROGRAM FILE
900
STAFF REVIEW FEASIBLE?
YES?
NO?
9001
REVISE
1000
PREPARE FOR BOARD APPROVAL
1001
COMPILE STAFF REPORTS
1002
COMPILE ALL SUPPORT REPORTS
1003
PREPARE BOARD BRIEFING
1004
PREPARE BOARD REPORT
1005
PROGRAM FILE
1100
BOARD ACTION APPROVED?
YES?
NO?
1101
REVIEW AND REVISE
1200
PERFORM PROGRAM CONTENT ANALYSIS
1201
IDENTIFY AND SELECT SUBJECT MATTER EXPERTS
1202
ACQUIRE/PREPARE DOT CLASSIFICATIONS
1203
PREPARE DETAIL ANALYSIS ON STUDENT POPULATION PROFILE
1204
ACQUIRE/PREPARE PROGRAM COURSE OUTLINES
1205
PROGRAM COURSE OUTLINES
1210
1206
REFINE PROGRAM PERSONNEL AND EQUIPMENT NEEDS
1207
PREPARE BID SPECS
1208
PREPARE PGM CONTENT REPORT
1209
PROGRAM FILE
1300
ACQUIRE/PREPARE PROGRAM TPO'S
1301
REVIEW INPUT ADVISORY BOARD DATA
1302
REVIEW INPUT TASK ANALYSIS DATA
1303
PRODUCE ROUGH PROGRAM TPO DRAFT
1304
REVIEW WITH STAFF AND ADVISORY COMMITTEE
1305
APPROVED?
NO?
1306
YES?
1307
RECEIVE ADVISORY INPUTS AND PRODUCE FINAL TPO DOCUMENT
1308
PUBLISH PROGRAM TPO'S
1309
PROGRAM FILE


1400
ACQUIRE/PRODUCE OTHER SUPPORT DOCUMENTS
1401
COURSE NARRATIVES
1402
PROGRAM FLOW CHARTS
1403
MEDIA SUPPORT BREAKOUTS
1404
STUDENT WORK SHEETS AND BOOKS
1405
UNITS DIAGNOSTIC EXAMS
1406
STUDENT PERFORMANCE AND DATA RECORDS
1407
PERFORMANCE COMPETENCY TESTS ANSWER KEYS
1408
INSTRUCTIONAL STRATEGIES
1409
INSTRUCTOR MANAGEMENT GUIDES
1410
VALIDATION GUIDES
1411
PROGRAM INTEREST/ APTITUDE INVENTORY CHARTS
1412
PROGRAM PRE-ENROLLMENT TESTS
1413
ALL SCORE TESTS, KEYS ANNOUNCEMENTS
1414
PROGRAM AND UNIT CERTIFICATES AND PR Brochures
1500
SELECT EQUIPMENT SOURCES
1501
LOCATE AND IDENTIFY SPECIFIC VENDORS
1502
REVIEW BID SPECS AND RECEIVE DEMONSTRATION
1503
UPDATE BID SPECS REPORT
1504
PROGRAM FILE
1600
RECOMMEND FOR BOARD APPROVAL
1601
REVIEW ALL STAFF REPORTS
1602
REVIEW FEASIBILITY REPORTS
1603
PREPARE BOARD BRIEFING
1604
PREPARE AGENDA REPORT
1605
PROGRAM FILE
1700
BOARD ACTION APPROVED?
YES?
NO?
REVISE
1800
ACQUIRE PERSONNEL EQUIPMENT AND FACILITIES
1801
LOCATE AND INTERVIEW ALL CLASSES OF PERSONNEL
1802
PREPARE AND PROCESS CONTRACTS
1803
INDIVIDUAL CONTRACTS
BOARD ACTION APPROVED?
NO
YES
1804
FINAL PROCESS
1805
PUBLISH ALL BID SPECS & RFP
1806
RECEIVE AND REVIEW BIDS FOR QUALIFICATIONS
1807
ANALYZE BIDS CONTENT AND SELECT AWARDEE
1808
PREPARE BOARD AGENDA ITEM
1809
BOARD AGENDA REPORT
BOARD ACTION APPROVED?
NO?
YES?
1510
PROCESS AWARDS
1900


MEDIA MAXIMIZING INSTRUCTIONAL SUPPORT MATERIALS
1901
ACQUIRE/EVALUATE COMMERCIALLY AVAILABLE MEDIA
1902
IDENTIFY SCRIPTING REQUIREMENTS
1903
ESTABLISH PRODUCTION PRIORITIES
1904
SELECT PRODUCTION SOURCES
1909
DECISION
1910
IN-HOUSE
1911
EXTERNAL SOURCE
1912
PREPARE RFP
1913
1914
BOARD AGENDA REPORT
BOARD ACTION APPROVED?
N
YES
AWARDS
1905
ADMINISTER PRODUCTION
1906
EVALUATE AND SIGN OFF COMPLETED INSTRUCTIONAL MODULES
1907
PREPARE INSTRUCTIONAL MODULE INVENTORY LIST
1908
2000
DESIGN IMPLEMENTATION/EVALUATION IN PROGRESS
2001
IDENTIFY AND SELECT INSTRUCTIONAL STRATEGIES
2002
ESTABLISH SCHOOLING FORMATS
2003
DESIGN IN SERVICE TNG PROGRAMS
2004
DESIGN Evaluation model
2005
PREPARE INDIVIDUAL INSTRUCTIONAL MANAGEMENT BUDGETS
2006
PREPARE LIST OF INDIVIDUAL INSTRUCTIONAL MANAGEMENT GOALS AND RESPONSIBILITIES
2007
BRIEF ALL PERSONNEL
2100
CONDUCT INSTRUCTOR IN-SERVICE TRAINING PROGRAM
2101
ESTABLISH & PUBLISH TRAINING SCHEDULE
CONDUCT NEW PERSONNEL BRIEFINGS
2103
PRESENT DISTRICT HISTORY AND GOALS
2104
PRESENT DISTRICT ESTABLISHED OPERATING PROCEDURES
CONDUCT RETURNING PERSONNEL BRIEFINGS
2106
PRESENT NEW OPERATING PROCEDURES
2107
PRESENT PROGRAM GOALS
2108
PRESENT BRIEFING INSTRUCTIONAL TECHNOLOGY AND INDIV INSTRUCTION CONCEPTS and Techniques
2109
WORKSHOP ON NEW EQUIPMENT AND FACILITIES
2110
CONDUCT WORKSHOP ON EVALUATION SYSTEMS
2200
ADMINISTER MONITOR STUDENT ENTRY PROCESS
2201
ADMINISTER STUDENT RECORDS SYSTEM
2202
ADMINISTER
2203
ADMINISTER CAREER COUNSELING
2204
ADMINISTER STUDENT PROGRAM PLACEMENT PROCESS
2205
ADMINISTER STUDENT ORIENTATION PROGRAM
2206
ESTABLISH Student BODY COUNCIL
2300
ADMINISTER PROGRAMS
2301
CONDUCT TEACHER EVALUATION AND MANAGEMENT
2302
SUPERVISE STUDENT EVALUATION MANAGEMENT
2303
SUPERVISE CURRICULUM MANAGEMENT
2400
ADMINISTER FINAL TESTING AND PLACEMENT PROGRAMS
2401
ADMINISTER ALL TESTING PROCESSES
2402
ADMINISTER AND REVIEW ALL SCORING PROCESSES
2403
ADMINISTER ANALYSIS OF TEST RESULTS
2404
ADMINISTER COUNSELING PROCESS
2405
GENERATE TEST RESULTS REPORTS
2406
STUDENT PROGRAM FILE


2601
ADMINISTER STUDENT RECORDS AND FEE SYSTEM
2501
ADMINISTER AND EVALUATE STUDENTS EDUCATIONAL objectives
P&M FILE
2502
ADMINISTER AND EVALUATE STUDENT PROGRAM REPORTS + DECISIONS
MGMT PROGRAM INFO. FILE
2503
ADMINISTER AND EVALUATE STUDENT PROGRAMS
RESOURCE COORDINATION INFO. FILE
2504
ADMINISTER STUDENT DATA CARDS
STUDENT INFO. FILE
EVALUATE INSTRUCTIONAL MANAGEMENT GOALS AND Budgets
2601
Evaluate management PROGRAM Goals.
EVALUATE management PROGRAM Budgets
2602
GOALS ACHIEVED?
YES?
NO?
2603
2604
ANALYZE SUCCESS FACTORS
DESIGN ALTERNATE AND OR REMEDIAL PROGRAM
2605
RE-ESTABLISH OR RE-EVALUATE NEW GOALS
2606
DEFINE PROGRAM AND BUDGET CHANGES
2607
ADJUST PROGRAM AND BUDGET
2609
PREPARE ACHIEVEMENT REPORT
2608
PROGRAM AND FEATURES
2700
ANALYZE ALL EVALUATION AND FEEDBACK INPUTS
2701
ANALYZE STUDENT GOALS REPORTS
2702
ANALYZE FACULTY REPORTS
2703
PREPARE PROGRAM ASSESSMENT REPORT
2704
ANALYZE BUDGET REPORTS
2705
PREPARE PROGRAM EVALUATION REPORT
2706
ADJUST PROGRAMS AS REQUIRED
2708
2707
PROGRAM FILE
2800
CONDUCT COST ANALYSIS PROGRAM
2801
EVALUATE ACHIEVED PROGRAM GOALS AGAINST BUDGET EXPENDITURES
2802
REVIEW ALTERNATE PROGRAM Budget PATHS
2803
ANALYZE PROGRAM COSTS FOR UNITS, FOR STUDENTS FOR SUPPORT
2804
ANALYZE COST VALUES FOR FACULTY FACILITIES PROGRAMS
2805
PREPARE AN COST ANALYSIS REPORT
2806
PLANNING PROGRAM FILE
2900
PREPARE AND PUBLISH REPORTS
2901
STUDENT INFO FILE
STUDENT REPORTS
STUDENTS - FACULTY
2902
COMMUNITY PROGRAM/ FACULTY FILES
STATISTICAL REPORTS
COMMUNITY - SCHOOL BOARD - FACULTY -
2903
PROGRAM FACULTY FILES
MANAGEMENT CONTROL REPORTS
SCHOOL BOARD MANAGEMENT FACULTY
2904
FACULTY/ PROGRAM/ RESOURCE FILE
INTERNAL/ EXTERNAL NARRATIVE REPORTS
COMMUNITY - SCHOOL BOARD - FACULTY - ADMINISTRATION - CURRICULUM -
2905
ALL FILES
FEDERAL/ STATE FUNDING REPORTS
FUNDING AGENCY - COMMUNITY - SCHOOL BOARD -

ACTIVITY	
100	ESTABLISH PROGRAM NEEDS Commence activities relating to the research and surveying of information required to establish program validity needs.
101-102	CONDUCT RESEARCH Extract information from faculty file relating to state or local program requirements and directives.
102-103	SURVEY NATIONAL OCCUPATIONAL TRENDS Obtain and analyze reports from national sources relating to occupational clusters, population forecasts, and labor manpower requirements. Extract data relating to regional or local area.
103-104	SURVEY STATE MANDATED PROGRAMS Obtain and analyze documents relating to state mandated programs, list program requirements, sources of funds, source references and details of mandated programs.
104-105	SURVEY FEDERAL PROGRAMS Obtain and analyze requirements and requests from federal sources for establishment of programs.
105-106	SURVEY LOCAL JOB NEEDS Contact local business sources, Chamber of Commerce, etc., and survey through interview and mail out instruments for local immediate short range and long range job requirements.
106-107	SURVEY LOCAL POLITICAL AND COMMUNITY INTERESTS Survey, by written and oral interview methods, the local political and community interests drawing from the community file source. This activity relates to placing a sensor system into the community in order to be politically aligned with the requirements and mood of the local area that the school district serves.
107-108	SURVEY STUDENT AND PARENTS INTERESTS Interview via mail and personal interviews attitudes and desires of parents and students that will be potential participants or supporters of the programs.
108-109	SURVEY 5-YEAR DISTRICT PLAN Analyze requirements that may be forecast in the districts five year PPBS plan or other alike projections.

109-110 **SURVEY SPECIAL STUDIES OR CONSULTANT REPORTS**
This activity relates to the surveying of any special reports that may be obtained from other districts, states or programs from across the country. Special attention should be given to any special consultant reports that may be on file, or that may be hired by the district to conduct any phase of a program needs assessment.

110 **PREPARE NEEDS ASSESSMENT REPORT**
All information that is obtained from activities 101 through 110 are collated, analyzed and matrixed in order to select a series of programs, by requirements and priorities that will best suit the needs of the students and of the ultimate local job needs of the area and the school district. This information is compiled and prepared in a needs assessment report.

200 **NEED EXISTS**
The needs assessment report is analyzed by a review committee that is designated by the administration. Its charge is to assess any legitimate needs for program training within the school district that will best serve the needs of students, mandated programs, and local/regional job requirements.

200 **NEED EXISTS - NO**
In the event that the review committee, based on its findings of the needs assessment report, determines that a specific program or a series of programs are not feasible, then route to activity #201, ABORT. No action is taken.

200 **NEED EXISTS - YES**
In the event that the review committee, based on its findings of the information contained in the needs assessment report, recommends a positive indication to establish a program, then commence activity #300.

300 **ESTABLISH PROGRAM ADVISORY COMMITTEE**
For each program to be implemented in the district an advisory committee is formed containing working members from the profession that the program represents. The advisory committee will be called upon to provide technical guidance and expertise in the initial establishment of and, as needed, throughout the operation of the program.

301-302 **IDENTIFY ADVISORY MEMBERS**
Prepare from local sources, community file, etc., a list of personnel that are technically and/or academically qualified to serve on each of the advisory committees.

302-303 **PREPARE AND ISSUE CALL LETTERS**
A formal call letter of invitation is prepared and issued to potential advisory committee members inviting them to participate as nonpaying members.

303 MEMBERS ACCEPT
A tally is kept of the positive and negative responses.

303-304 MEMBERS ACCEPT - NO
In the event an invitee refuses the call, then route to activity #301 to identify additional potential advisory members. This process continues until the committees are staffed.

303-304 MEMBERS ACCEPT - YES
Upon receipt of formal acceptance issue a thank you letter. A master file is prepared containing the names, addresses, phone numbers, and qualifications of all advisory members.

305-306 PREPARE ADVISORY BRIEFING
Staff prepares a detailed briefing for the advisory committee containing information dealing with: the philosophy of the school program, history of the school, development history and objectives of the program, an analysis of the needs assessment report for each program. A handout containing guidelines for the advisory members should be prepared. The guidelines contain the requirements and expectations that the school will make upon the advisory members, as well as the procedures for working with the individual programs.

306-307 BRIEF ADVISORY MEMBERS
A formal briefing is given to all advisory members stressing the importance of the role the advisory committee will play in the overall program. A copy of each of the general plans containing the scope, intent and ultimate projections for each program is presented to the appropriate advisory committee members.

307-308 OBTAIN ADVISORY MEMBERS INPUTS
Advisory committee members are requested to react to the general findings of the needs assessment report and the general intent of the program as defined during the briefing.

308-309 PREPARE ADVISORY COMMITTEE REPORT
Inputs and minutes that are taken from the advisory committee meetings are prepared, analyzed and issued in the form of advisory committee reports. Copies are sent to each participating advisory member, district administrators and appropriate members of the board of directors, and staff. When unified or other participating districts are involved, reports should be sent to the superintendents and key personnel involved in the participating districts.

309 PROGRAM FILE
The advisory committee reports and the needs assessment reports pertaining to each program are filed in an individual program file and stored for future use.

400 IDENTIFY PROGRAM AND EQUIPMENT LOGISTIC REQUIREMENTS

This activity relates to the steps required to identify the logistic support required to implement each program.

401-402 IDENTIFY PROGRAM OBJECTIVES AND DEMANDS

A listing is prepared detailing the identified requirements for each program in terms of stated objectives, general and special requirements, and demands that the program will make upon the ongoing system.

402-403 IDENTIFY PROGRAM D.O.T. TITLES

Appropriate Dictionary of Occupational Titles (D.O.T.) are identified and properly matched for each program.

403-404 IDENTIFY STUDENT POPULATION PROFILE

An analysis is prepared of the student population that will be fed into the program. Information relating to the general types of people that have been successful in each career field is drawn from the community file, activity #106, from the needs assessment report, activity #110, and from program advisory committee inputs, activity #307.

404-405 IDENTIFY TYPES OF SUPPORT PERSONNEL

A listing is prepared of the types of personnel, by job clusters, that will be required to support each program. The list details faculty, technical expertise, peripheral support, custodial, maintenance, etc.

405 IDENTIFY PROGRAM AS LOCAL AND/OR REGIONAL

In this activity an analysis is made of the intent and scope of each program to determine if it is restricted to a local program, or has application to be expanded, or to be joined into a regional program with other districts or commercial locations.

401-406 IDENTIFY PROGRAM EQUIPMENT OBJECTIVES

An analysis is made, based on each program's objectives, of the program equipment requirements. The program objectives and equipment requirements are matched and listed.

406-407 IDENTIFY EQUIPMENT ITEMS

A second level detailed list is made of the specific types of items that are required to support each program. This may include furniture, lathes, tools, machines, etc.

407-408 SURVEY SCHOOL INVENTORY RESOURCES

From the identified equipment items list, activity #406-407, survey existing district inventories to establish what materials or resources are available for use in each of the programs.

408-409 IDENTIFY PURCHASE ITEMS
As a result of activity #407-408, identify items that will be required to be purchased to either supplement or augment existing inventories.

409-410 IDENTIFY DONATION AND/OR LOAN ITEMS
Identify from the equipment requirements list, activity #406-407, any items that may be obtained through donations and/or loans from businesses, other school districts, industry, government, etc.

410 IDENTIFY SPECIAL MAKE ITEMS
Identify those items that are not readily accessible as off the shelf items that may require special tooling, fabrication or processing in order to implement the equipment requirements of each program.

411-412 IDENTIFY PROGRAM SUPPLIES
List all expendable and nonexpendable support supplies that will be required to implement each program.

412-413 SURVEY SCHOOL SUPPLY INVENTORY
From the identified program supply list, activity #411-412, survey existing district inventories to ascertain what will be available for each program.

413 IDENTIFY SUPPLY PURCHASE ITEMS
From the identified program supplies list, activity #411-412, and the available inventory list, activity #407-408, identify those items required for purchase that are not accessible or available.

414 PREPARE LOGISTIC REPORT
Inputs derived from activities #401 through #413 are collated and fed into a logistic report that details program requirements by items, and identifies any special problems that may be encountered in the logistic support for each program.

415 PROGRAM FILE
Logistic report is filed in the program file for storage and future use.

500 IDENTIFY FACILITIES REQUIREMENTS
This activity relates to the process of identifying facilities that will be required to implement selected programs. Projected space requirements are identified and tentative layouts are prepared that will be required to house the program, equipment and personnel.

501-502 INVENTORY EXISTING FACILITIES
An analysis is made of available facilities to determine availability for program use.

502-503 MEETS PROGRAM NEEDS? YES
If existing facilities are adequate and available then route to next activity, #600.

502-504 MEETS PROGRAM NEEDS? NO
In the event that the existing facilities are not available or do not adequately meet the program requirements, then proceed to next activities, #504-508.

504-505 EVALUATE REASSIGNMENT OF AVAILABLE FACILITIES
An analysis is prepared of the feasibility for reassignment of personnel, projects, etc., in order to accommodate program facilities requirements.

505-506 EVALUATE RENTING AND/OR LEASING
In the event that adequate facilities are not available, an analysis is made to determine if space is available by renting and/or leasing to accommodate the program requirements.

506 LOCATE OFF CAMPUS SITES
A search and survey is made of potential off campus facility sources.

505-507 EVALUATE BUILDING NEW FACILITIES
An analysis is prepared of the need and feasibility of building new facilities to accommodate projected program requirements.

507-508 IDENTIFY ON CAMPUS SITES
An analysis is prepared of potential locations for new buildings or remodeling of existing facilities on campus.

508-509 PREPARE FACILITIES REPORT
Information obtained from activities #501 through #507 are compiled and entered into a facilities report. This report presents the background and recommendations for the proposed facilities implementation plan of action.

509 PROGRAM FILE
The facilities report is filed into the program file for storage and future reference.

600 IDENTIFY STAFF REQUIREMENTS
This activity relates to the processes involved in identifying job descriptions, work task statements and required personnel support.

601-602 INVENTORY EXISTING PERSONNEL
A list is prepared detailing the types of positions required for each program. An analysis is prepared of all existing school personnel that may be employed to serve in each program.

602-603 EVALUATE AND IDENTIFY REASSIGNMENTS
From the existing inventory, activity #601-602, an evaluation is prepared identifying those personnel that may be reassigned to serve specific program requirements.

603-604 IDENTIFY NEW HIRE REQUIREMENTS
After a careful analysis of the existing personnel inventory, activities #601-602-603, an analysis is prepared of the types of personnel that will be required to be hired. This activity includes the preparation of job descriptions and work task statements.

604 IDENTIFY STAFF ORIENTATION AND INSERVICE TRAINING REQUIREMENTS
An analysis is prepared of the requirements, objectives and contents of a staff orientation and inservice training program. This training program is designed to acquaint existing and new personnel of the special requirements of each program to be implemented.

605-606 PREPARE STAFFING REPORT
Information obtained from activities #601 through #604 is entered into a staffing report which details the exact types of available and required personnel, plus other required supporting data.

606 PROGRAM FILE
The staffing report is fed into the program file for storage and future use.

700 IDENTIFY PROGRAM COST FACTORS
This activity relates to all of the steps and processes required to identify projected program costs for each identified program.

701-702 IDENTIFY PROGRAM SELF SUPPORT CAPABILITIES
List of all available elements of support such as existing budgets, grants, and other alike funds that can be allocated to support a program.

702-703 ESTABLISH PERSONNEL COSTS
Relating to activity #605, Staffing Report, cost out the financial requirements for identified personnel.

703-704 IDENTIFY CLASSIFIED, CERTIFICATED, TEMPORARY STUDENTS AND AIDES
This is a further delineation of activity #702 by categories.

704 IDENTIFY OFFICE SUPPORT EQUIPMENT
In conjunction with other identified supplies, list out specific office support equipment that will be required to support identified personnel.

705-706 IDENTIFY EQUIPMENT AND FACILITIES COSTS

This activity relates to compiling all the identified costs for equipment and facilities. Reference activities #508, Facilities Report, and #414, Logistic Report. This information is drawn from program files as required.

706-707 IDENTIFY CAPITAL EQUIPMENT ITEMS

Items that are identified as capital equipment are segregated and listed.

707-708 IDENTIFY MATERIALS AND SUPPLIES COSTS

This activity relates to the detailed breakdown of specific materials and supplies by cost and by identifiable allocations.

708-709 IDENTIFY ALL RENTAL ITEMS COSTS

This activity relates to identifying all items that will be rented, listing their appropriate costs and conditions of terms for leases, shipment, delivery, etc.

709 IDENTIFY ALL FACILITIES COSTS

Relating to the activity #500 series, all cost data is extracted from the Facilities Report, #508, and the Program File, #509.

710-711 IDENTIFY ALL PROGRAM DEVELOPMENT COSTS

In this activity all compiled costs are identified and tabulated.

711-712 IDENTIFY AVAILABLE FUNDS AND EXTANT RESOURCES

Match cost requirements as identified in activity #710 against existing district budgets and other extant funding resources.

712-713 PREPARE PROGRAM COST ANALYSIS REPORT

A report is prepared listing each program's projected costs and any available or identified incomes. (This is similar to a profit and loss statement as prepared by a commercial or industrial firm.) In addition, a breakout is included displaying by program costs and materials, shelf life versus numbers of students or student hours to be processed.

713 PROGRAM FILE

The program cost analysis report is transmitted to the program file for storage and future use.

800 DEFINE PROGRAM ADVANTAGES TO DISTRICT

This activity generates a statement of justification for the programs in terms of advantages and assets that can be accrued to the district.

801-802 IDENTIFY OR DEFINE WITH DISTRICT MASTER PLAN
Statements of program objectives are aligned with the district master plan. Reference to activity #108, the Survey of the Five Year District Plan, or the PPBS extracts.

802-803 IDENTIFY BENEFITS OF PROGRAM TO COMMUNITY
This activity relates to the preparation of statements that define the advantages of the program to the community. (Benefits are stated in terms of: filling existing job requirements; potential long range, intermediate and short range job placement requirements; taking people off welfare roles; or avoiding getting them on the welfare roles.

803-804 IDENTIFY PROGRAM BENEFITS TO STUDENTS
Statements are prepared based on the definition of the program, listing the specific benefits that students will acquire through participation in the program.

804-805 IDENTIFY JOB PLACEMENT OPPORTUNITIES
Referencing activity #110, Needs Assessment Report, and activity #105, Survey Local Job Needs, a tabulation is prepared of the potential pledged or prepledged job opportunities that will exist for graduates of the defined programs.

805-806 IDENTIFY PROGRAM REGIONAL APPLICATIONS
Statements are prepared referencing the flexibility of the program in terms of adapting or expanding into a regional concept.

806-807 PREPARE FINAL FEASIBILITY REPORT
All existing reports in the program file are collated and a final report is prepared which lists all the identifiable features of each program. This activity is similar to preparing a proposal and game plan documentation.

807 PROGRAM FILE
The final feasibility report is stored in the program file for future use.

900 STAFF REVIEW FEASIBLE
This activity relates to the final staff review of all documentation and processing that has occurred prior to recommending for board approval.

900-901 STAFF REVIEW FEASIBLE? NO
In the event some of the information does not tally correctly and/or the staff members challenge some of the findings, then activate activity #901. The black arrow indicates any specific challenged item between the activity #300 series to the activity #900 series that can be subject to a closer scrutiny and be subject to a revision.

900-1000	STAFF REVIEW FEASIBLE? YES If, upon final review of all documentation, staff endorses approval, proceed to activity #1000.
1000	RECOMMEND FOR BOARD APPROVAL This activity deals with the process of preparing the final report for board acceptance.
1001-1002	COMPILE STAFF REPORTS All staff reports are extracted from the program file and are collated and reduced for the board's review.
1002-1003	COMPILE ALL SUPPORT REPORTS All internal and external support documentations are collated and reduced for the board's review.
1003-1004	PREPARE BOARD BRIEFING A special handout package and a standup briefing is prepared for delivery to the board.
1004-1005	PREPARE BOARD REPORT This activity relates to preparing a formal agenda report for submission to the board for approval.
1005	PROGRAM FILE All documentation prepared during this activity is stored in the program file.
1100	BOARD ACTION APPROVED? YES If the board accepts the report and approves, proceed to activity #1200.
1100-1101	BOARD ACTION APPROVED? NO In the event the board does not accept the report and returns it for revision or additional staff work, proceed to activity #1101, Review and Revise.
1101	REVIEW AND REVISE As required, any item between activities #300 and #1000 can be adjusted at the request of the board.
1200	PERFORM PROGRAM CONTENT ANALYSIS With the approval of the board to proceed, the curriculum activities are commenced and the detailed content analysis of each program is identified.
1201-1202	IDENTIFY AND SELECT SUBJECT MATTER EXPERTS A listing is prepared of known and available subject matter experts that can best serve the needs of each identified program.
1202-1203	ACQUIRE AND PREPARE D.O.T. CLASSIFICATIONS A detailed list is prepared of the D.O.T. classifications and subclassifications that are identified with the requirements for each program. This activity relates to activity #402-403, Identify Program D.O.T. Titles.

1203-1204 **PREPARE DETAIL ANALYSIS ON STUDENT POPULATION PROFILE**

This activity is an in depth continuation of activity #403-404, Identify Student Population Profile. Included in detail is an extract from a task analysis of the program requirements, an analysis of the data of the incoming student population, an analysis of the inputs from the advisory committee of the types of successful people that best serve in the career field or job field that the program will be serving.

1204-1205 **ACQUIRE OR PRODUCE PROGRAM COURSE OUTLINES**

Available program course outlines are acquired and examined to meet the needs of the programs. If none are available, then course outlines must be produced.

1205-1210 **PROGRAM COURSE OUTLINES**

The documents that are generated from this activity are prepared and then filed in the Program File, #1209, for storage purposes.

1206-1207 **REFINE PROGRAM PERSONNEL AND EQUIPMENT NEEDS**

After the program content analysis is prepared, documents relating to personnel and equipment requirements are once again scrutinized and updated accordingly.

1207-1209 **PREPARE BID SPECIFICATIONS**

Bidding specifications are prepared for equipment that will be required to serve program needs. The bid spec document is then stored in activity #1209, Program File, for future use.

1208-1209 **PREPARE PROGRAM CONTENT REPORT**

The program content analysis and other support data is listed on a final program content report and then filed in activity #1209, Program File.

1300 **ACQUIRE/PRODUCE PROGRAM TERMINAL PERFORMANCE OBJECTIVES**

This activity relates to the process of acquiring or preparing terminal performance objectives for each of the identified programs.

1301-1303 **REVIEW INPUT ADVISORY BOARD DATA**

This activity relates to reviewing the responses from the advisory committee after it has reviewed the terminal performance objectives.

1302-1303 **REVIEW INPUT TASK ANALYSIS DATA**

This activity relates to reviewing task analysis data from each program. The task analysis information is obtained by interviewing members of the advisory committee in relation to what they expect the incoming trainee to be able to perform on the job as well as what they discern the job to be, a compilation of: printed job descriptions, published task analysis data and/or actual performed task analysis verification activities.

1303-1304 PRODUCE ROUGH PROGRAM TERMINAL PERFORMANCE OBJECTIVES DRAFT

The first draft of the terminal performance objectives is prepared based on the inputs of activities #1301 and #1302.

1304-1305 REVIEW WITH STAFF AND ADVISORY COMMITTEE

The terminal performance objectives are cycled through the review committee and the staff for comments, adjustments, and direct inputs.

1305 APPROVED?

This activity relates to the decision process and acceptance process by the staff and the advisory committee of the terminal performance objectives.

1305-1306 APPROVED? NO

In the event the terminal performance objectives (TPO's) are not approved, then proceed to activity #1303 and recycle until approval is obtained.

1305-1307 APPROVED? YES

Upon receipt of approval from the review committee, the TPO's are processed for final release.

1307-1308 RECEIVE ADVISORY INPUTS AND PRODUCE FINAL TPO DOCUMENT

The final revisions and inputs are processed and the final terminal performance document is typed and reproduced for publication.

1308-1309 PUBLISH PROGRAM TPO's

This activity relates to the publication and distribution of the approved terminal performance objectives.

1309 PROGRAM FILE

All program terminal performance objectives are filed in the program file.

1400 ACQUIRE/PRODUCE OTHER SUPPORT DOCUMENTS

This activity relates to the acquisition and/or the production of all support documents that are required to assist in the preparation of curriculum, administration, and the implementation of each program.

1401 COURSE NARRATIVES

1402 PROGRAM FLOW CHARTS

1403 MEDIA SUPPORT BREAKOUTS

1404 STUDENT WORKSHEETS AND BOOKS

1405 UNITS DIAGNOSTIC EXAMINATIONS

1406 STUDENT PERFORMANCE AND DATA RECORDS

1407 PERFORMANCE COMPETENCY TESTS ENTRY KEYS

1408 INSTRUCTIONAL STRATEGIES

1409 INSTRUCTOR MANAGEMENT GUIDES

1410 VALIDATION GUIDES

1411 PROGRAM INTEREST/APTITUDE/INVENTORY EXAMINATIONS

1412 PROGRAM PRE-EMPLOYMENT TESTS

1413 ALL SCORE TESTS, KEYS AND OUTCOMES

1414 PROGRAM AND UNIT CERTIFICATES AND P.R. BROCHURES

1500 SELECT EQUIPMENT SOURCES
This activity relates to the process of identifying and locating vendors, receiving demonstrations, and updating the bid specifications. Related activities are #406, #705, #1206 and #1207.

1501-1502 LOCATE AND IDENTIFY SPECIFIC VENDORS
This activity relates to the process of assembling a qualified vendor list. Vendors listed should have the proper equipment and capabilities to support the program requirements.

1502-1503 REVIEW BID SPECS AND RECEIVE DEMONSTRATIONS
The documents prepared in activity #1207 are reviewed and updated as required. When called for, demonstrations are provided by individual vendors to prove capability.

1503-1504 UPDATE BID SPECS REPORTS
Related to activity #1207, the final bid specifications are updated and a report is prepared listing the final bidding requirements.

1504 PROGRAM FILE
Update bidding specs report, process and file in the program file for future use.

1600 RECOMMEND FOR BOARD APPROVAL
This action relates to the final board action required to end the planning phase and activate the implementation phase of the program.

1601-1602 REVIEW ALL STAFF REPORTS
All processed staff reports are reviewed, updated and collated for preparation of the final agenda report.

1602-1603 REVIEW FEASIBILITY REPORTS
All staff feasibility reports dealing with facilities, personnel, costs, etc., are reviewed and updated for final inclusion in the agenda report.

1603-1604 PREPARE BOARD BRIEFING
A special board briefing is prepared, in handout and standup briefing formats, detailing the final results of the analysis of the staff and of the final program contents and costs.

1604-1605 PREPARE AGENDA REPORT
Information relating to a formal agenda report containing the request to approve action is prepared.

1605 PROGRAM FILE
The agenda report is filed in the program file.

1700 BOARD ACTION APPROVED?
Decision activity by the board to accept or reject the final agenda report.

1700-1701 BOARD ACTION APPROVED? NO
In the event the board action refuses all or part of the report, then refer to Revise, activity #1701.

1701 REVISE
An item, as required between activities #1200 to #1700, may be adjusted at the request of the board.

1700-1800 BOARD ACTION APPROVED? YES
With board approval, then refer to activity #1800.

1800 ACQUIRE PERSONNEL, EQUIPMENT AND FACILITIES
This activity deals with final processes of acquiring staff, equipment and facilities that are required to implement selected programs.

1801-1802 LOCATE AND INTERVIEW ALL CLASSES OF PERSONNEL
Referring to activities series #600, identified personnel required to assist in the implementation of each program are located and interviewed.

1802-1803 PREPARE AND PROCESS CONTRACTS
Upon successful completion of interviews and acceptance by personnel, all contracts are prepared and processed through the district system for final implementation.

1803-1804 INDIVIDUAL CONTRACTS
Individual contracts are prepared and presented to the board for approval.

1804-1805 BOARD ACTION APPROVAL - NO?
In the event any individual contract is rejected by the board, route from activity #1805 to #1801 and recycle the process until all of the personnel slots are filled.

1805-1806 BOARD ACTION APPROVAL - YES?
With board approval, then proceed to activity #1806.

1806 FINAL PROCESS
Approved contracts are processed and routed to those concerned.

1807-1808 PUBLISH ALL BID SPECS AND REQUESTS FOR PROPOSALS (RFP's)
Referencing activities #1503, all bidding specifications and requests for proposals are published and distributed to the known bidders on the list and through normal legal advertising channels.

1808-1809 REVIEW AND RECEIVE BIDS FOR QUALIFICATIONS
All responses to the RFP's are properly received, documented, reviewed and analyzed to ascertain that they meet the RFP requirements. Qualified bids are submitted for processing -- others are disqualified.

1809-1810 ANALYZE BIDS CONTENT AND SELECT AWARDEE
An awards committee analyzes the bids contents and a selection is made based on the best price and equipment offer that will assist in the implementation of each program. Awardee's are recommended for submittal to the board for final approval.

1810-1811 PREPARE BOARD AGENDA ITEM
The recommendations of the awards committee are prepared in agenda format for board selection and awarding of contracts.

1811-1812 BOARD AGENDA REPORT
Upon receipt of the board agenda report, the board takes action to accept or reject.

1812-1813 **BOARD ACTION APPROVED? NO**

With a negative board action on any agenda report item, route to activity #1809 to request a re-analyzing of the bid contents and/or to select a new awardee. If sufficient circumstances prevail, route to activity #1807, declare a nonbid and republish new bid specifications and RFP's, then complete the total process until a final award is made.

1812-1814 **BOARD ACTION APPROVED? YES**

With board approval, route to activity #1814.

1814 **PROCESS AWARDS**

Approved contracts are processed and routed to those concerned.

1900 **ACQUIRE/PRODUCE MEDIA MODULES AND INSTRUCTIONAL SUPPORT MATERIALS**

This activity relates to the implementation phase of the curriculum requirements.

1901-1902 **ACQUIRE/EVALUATE COMMERCIALLY AVAILABLE MEDIA**

A search and analysis is made of commercially available media support items that may be used in each program. This search is made in an effort of not having to produce or originate new materials.

1902-1903 **IDENTIFY SCRIPTING REQUIREMENTS**

After analysis of the commercially available materials, those items not available are identified for custom or specialized scripting requirements.

1903-1904 **ESTABLISH PRODUCTION PRIORITIES**

Based on program requirements, availability of funds, subject matter experts, and time requirements, a priority schedule is prepared listing items to be produced. This includes all formats such as paper handouts, motion picture films, tape slides, and other support items.

1904-1909 **SELECT PRODUCTION SOURCES**

From published lists of available production sources a compilation is made of those resource agencies that are available to produce identified requirements.

1909-1910 **DECISION - IN-HOUSE**

Management makes a determination if the production sources will be from in-house sources. The in-house processing requirements are activated to implement the required productions.

1909-1911-1912 **DECISION EXTERNAL SOURCE**

In the event that a determination is made to use external sources, then commence activity series #1912-1917.

1912-1913 **PREPARE RFP**

A request for proposal for production services is prepared detailing the production requirements, available SME's and resources that will be provided to the contractor by the district.

1913-1914 PUBLISH, RECEIVE AND AWARD BIDS

This activity refers to the normal process of releasing an RFP, reviewing bids for qualifications, analyzing bids for content, and selecting an awardee.

1914-1915 BOARD AGENDA REPORT

A board agenda report is prepared listing the recommendations of the awards committee.

1915-1916 BOARD ACTION APPROVED? NO

In the event an item is rejected by the board, route to activity #1912 and recycle until all items clear the board.

1915-1917 BOARD ACTION APPROVED? YES

With board approval, awards are processed in the normal manner.

2000 DESIGN IMPLEMENTATION AND EVALUATION PROCEDURES, PREPARE AND ASSIGN OPERATING BUDGETS, INDIVIDUAL INSTRUCTION MANAGEMENT GOALS AND RESPONSIBILITIES

This activity relates to the process of establishing contracts, budgets, and individual goal assignments between the administration and faculty.

2001-2002 IDENTIFY AND SELECT INSTRUCTIONAL STRATEGIES

Instructional strategies related to the implementation of each program, and aligned with program objectives and goals, are identified, selected and prepared.

2002-2003 ESTABLISH SCHEDULING FORMATS

This activity relates to the preplanning of various scheduling formats that are required for inservice training, presentation of individualized instruction, and student management scheduling.

2003-2004 DESIGN INSERVICE TRAINING PROGRAMS

This activity relates to the process of detailing and designing inservice training programs for faculty, existing and new personnel. This training program will include inservice training for procedures, techniques, philosophies, operation and use of equipment, and materials.

2004-2005 DESIGN EVALUATION SYSTEM

This activity relates to the process of designing an instructional and administration evaluation system. The purpose of this system is to ascertain if management and faculty goals are being achieved.

2005-2006 PREPARE INDIVIDUAL INSTRUCTIONAL MANAGEMENT BUDGETS

In this activity the administration prepares individual program budgets for each instructional manager, listing capital and supply items, salaries and operational budgets.

2006-2007 PREPARE LIST OF INDIVIDUAL INSTRUCTIONAL MANAGEMENT GOALS AND RESPONSIBILITIES

A detailed list is prepared of the individual program management goals and the instructional manager's responsibilities. This document in effect becomes a contract between the administration and the faculty and will be used as a measuring device for the accountability process. Included in the document are time bar charts and check points for evaluation purposes.

2007 BRIEF ALL PERSONNEL

Management is responsible in this activity to individually brief all involved personnel. The briefing should include: an understanding of the instructional management goals, personnel responsibilities, and what they will each be held accountable for; an understanding of the content and structure of the instructional management budgets and what they will be held accountable for; an understanding of the philosophy and workings of the evaluation model, the scheduling formats, instructional strategies, and the content and intent of the inservice training programs that will be prepared for all personnel concerned. In this activity an opportunity is presented for administration and faculty to iron out any differences of philosophies, opinions, or intent. In effect, this becomes a chance to clear up communications prior to actual activation of the instructional process

2100 CONDUCT INSTRUCTOR INSERVICE TRAINING PROGRAM

This activity relates to implementing the planned inservice training program that was designed during the implementation phase.

2101 ESTABLISH AND PUBLISH TRAINING SCHEDULE

A revised training schedule is prepared and published announcing the inservice training program times and locations.

2102-2103 CONDUCT NEW PERSONNEL BRIEFINGS

A special briefing is prepared that details the new hire requirements for all new incoming personnel.

2103-2104 PRESENT DISTRICT HISTORY AND GOALS

As part of the new personnel briefing the district's history, objectives and goals are presented either in written and/or in a standup briefing format.

2104-2106 PRESENT DISTRICT ESTABLISHED OPERATING PROCEDURES

A presentation is given of an overview of all established district procedures and basic ground rules. Upon completion of this activity, route to activity #2106 and follow the normal orientation procedure.

2105 CONDUCT RETURNING PERSONNEL BRIEFINGS

A general overview briefing, reorientation and rewelcoming back to the district is presented to returning district personnel.

2106 PRESENT NEW OPERATING PROCEDURES

All personnel receive a briefing concerning the new programs and operating procedures.

2107-2108 PRESENT PROGRAM GOALS

An in-depth presentation is made of overall established program goals in relation to short-, medium- and long-term objectives.

2108-2109 PRESENT BRIEFINGS ON INSTRUCTIONAL TECHNOLOGY AND INDIVIDUAL INSTRUCTION CONCEPTS AND TECHNIQUES

A series of briefings and/or workshops are presented to all concerned in order to provide an orientation to the basic concepts of instructional technology in modern education and to the working concepts and techniques of individualized instruction.

2109-2110 CONDUCT WORKSHOP ON NEW EQUIPMENT AND FACILITIES

New equipment items and new facility areas are introduced to all personnel to acquaint them with the uses and limitations.

2110 CONDUCT WORKSHOP ON EVALUATION AND REPORTING SYSTEMS

This activity relates to a general briefing and workshop dealing with the interaction of the evaluation and validation techniques that will be used throughout the instructional process. Specific attention must be paid to the reporting technique and to the instruments that will be used for collecting and assimilating information throughout the administrative cycle.

2200 ADMINISTER AND MONITOR STUDENT ENTRY PROCESS

This activity relates to all activities relating to the handling of incoming students and to the processing of their records.

2201-2202 ADMINISTER STUDENT RECORDS SYSTEM

This activity relates to the administration of the record files; the collection data instruments; storing, processing, analyzing and distribution of all student records.

2202-2203 ADMINISTER MEDICAL PROCESSING

This activity relates to the process of establishing medical records, medical histories, and medical examinations for all incoming students.

2203-2204 ADMINISTER CAREER COUNSELING

This activity relates to the administration of the career counseling and guidance process.

2204-2205 ADMINISTER STUDENT PROGRAM PLACEMENT PROCESS

This activity relates to the administration and validation of the selection process and program placement for each student.

2205-2206 **ADMINISTER STUDENT ORIENTATION PROGRAM**

This activity relates to conducting the orientation program for all incoming students. The program contains the operating procedures, rules and regulations of the school, new techniques and operational use of instructional technology and individualized instruction, and the use of any student operated equipment that may be used in the self-instructional mediated programs.

2206 **ESTABLISH AND COORDINATE STUDENT BODY COUNCIL**

This activity relates to the organization of a student body council to act as a communication link between the faculty, administration and the student body. This activity relates to community sensor activities #106 and #107.

2300 **ADMINISTER INSTRUCTIONAL PROGRAMS**

This activity relates to the total administration process for conducting all instruction.

2301-2302 **CONDUCT TEACHER EVALUATION AND MANAGEMENT**

This activity relates to the administration's process of monitoring, counseling and interacting with the teachers.

2302-2303 **SUPERVISE STUDENT EVALUATION AND MANAGEMENT**

This activity relates to the administrative management responsibilities for supervising the student evaluation process.

2303 **SUPERVISE CURRICULUM MANAGEMENT**

This activity relates to all activities dealing with the supervision of curriculum management as prescribed by state law.

2400 **ADMINISTER FINAL TESTING AND PLACEMENT PROGRAMS**

This activity relates to the administration of all student testing and for student placement within programs.

2401-2402 **ADMINISTER ALL TESTING PROCESSES**

This activity relates to the administrative responsibility for supervising and administering all testing processes, test instruments, and associated procedures.

2402-2403 **ADMINISTER AND REVIEW ALL SCORING PROCESSES**

This activity relates to the administrative responsibilities for reviewing the scoring processes, correction processes and the keeping of student test keys and scoring instruments.

2403-2404 **ADMINISTER ANALYSIS OF TEST RESULTS**

This activity relates to the administration and monitoring of the analysis of final results of all test scores.

2404-2405 ADMINISTER COUNSELING PROCESS
This activity relates to the administration of the counseling process that dictates student routing and rerouting as may be discerned by the results of interim tests.

2405-2406 GENERATE TEST RESULTS AND PLACEMENT REPORTS
This activity relates to generation, processing and distribution of test results and placement reports.

2406 STUDENT PROGRAM FILE
All test results and placement reports are filed in individual student program files for storage and teacher use.

2500 ADMINISTER STUDENT RECORDS AND FILE SYSTEM
This activity relates to the supervision and administration of all storage, retrieval, input and purging of all records and files that relate to the student record system.

2501-2502 ADMINISTER AND EVALUATE STUDENT'S EDUCATIONAL OBJECTIVES
This activity relates to the administrative responsibility for examining program files on a periodic basis and for the evaluation of the individual student's selected educational objectives in terms of realism and suitability.

2502-2503 ADMINISTER AND EVALUATE STUDENT PROGRAM REPORTS AND DECISIONS
This activity relates to the administrative responsibility to examine and evaluate the student reports, filed in the management and program information files. Special attention is given in terms of examining decisions and student activity status sheets in order to ascertain that the system is working properly and that the students are being properly processed.

2503-2504 ADMINISTER AND EVALUATE STUDENT PROGRAMS
This activity relates to the overall responsibility for evaluating the content of student programs in terms of resource material and curriculum. Materials are obtained from the resource curriculum information file.

2504 ADMINISTER STUDENT DATA CARDS
This activity relates to the administrative responsibility for the supervision and fidelity of the student information file. Attention is directed to the process for collecting student data information and for the overall security of all stored information.

2600 EVALUATE INSTRUCTIONAL MANAGEMENT GOALS AND BUDGETS
This activity relates to the assessment of individual instructional managers in terms of program and budgetary performance.

2601-2602 EVALUATE MANAGEMENT PROGRAM GOALS AND BUDGETS

This activity relates to the administrative evaluation with the instructional managers of the status of their individual program goals and budgets that were established in activities #2006 and #2005.

2602-2603 GOALS ACHIEVED? YES

If program goals, budgets and targets have been met, then proceed to activity #2603 - 2605.

2603-2605 ANALYZE SUCCESS FACTORS

The administration and faculty will attempt to extract and analyze the success contributing factors. This information will be used later in assisting others who are having difficulty in achieving their individual program goals.

2602-2604 GOALS ACHIEVED? NO

When stated goals have not been achieved, then proceed to activity #2604 - 2605.

2604-2605 DESIGN ALTERNATE AND/OR REMEDIAL PROGRAMS

Administration will work with the responsible faculty and support personnel to design an alternate critical path and/or remedial program to assist the instructional managers to achieve their missed program and budget goals.

2605-2606 RE-ESTABLISH OR RE-EVALUATE NEW GOALS

In this activity a reassessment is made of new or existing program goals that are to be achieved within specific time frames.

2606-2607 DEFINE PROGRAM AND BUDGET CHANGES

This activity provides an opportunity to redefine and renegotiate any specific program or budget changes that have occurred as a result of the evaluation process.

2607-2609 ADJUST PROGRAM AND BUDGET

As required by new program changes, program content, schedules, objectives and other support items as well as budget considerations, are adjusted in appropriate areas.

2607-2608 PREPARE ACHIEVEMENT REPORT

At the end of each evaluation process, administration will prepare an individual achievement report detailing the accountability and achievements of each individual manager.

2608 PROGRAM AND FACULTY FILE

Achievement reports are filed in the program and faculty file for storage purposes.

2700 ANALYZE ALL EVALUATION AND FEEDBACK INPUTS

This process relates to all activities that require constant monitoring of all evaluation feedback instruments and data. This includes written, mechanical, observation and other devices and methods used for evaluating success and/or failure factors in programs and logistic support. This activity fosters the maintenance of a two-way feedback communication system.

2701-2702 ANALYZE STUDENT SCORE REPORTS

This activity relates to analyzing student score reports to ascertain the effectiveness of the instructional program, the evaluation program and stated program goals.

2702-2703 ANALYZE FACULTY REPORTS

This activity relates to the analysis and monitoring of all faculty reports in order to obtain data regarding progress in relation to program and faculty observations.

2703-2704 ANALYZE PROGRAM ACHIEVEMENT REPORTS

This activity relates to the process of analyzing all program achievement reports in terms of achieved goals, problems faced, solutions used, and other difficulties or successes encountered in implementing each program.

2704-2705 ANALYZE BUDGET REPORTS

This activity relates to the process of monitoring and analyzing, by individual programs or by program areas, all expenditures and cost control techniques.

2705-2706 PROGRAM EVALUATION REPORT

This activity relates to the compilation of all evaluation data from the feedback process and the preparation in terms of an administrative recommendation evaluation report that will be used to guide the planning and adjustment scheduling of existing programs and newly forecast programs.

2706-2708 ADJUST PROGRAMS AS REQUIRED

This activity relates to utilizing information gained from evaluation of feedback in order to adjust programs in the areas that require adjustment; i.e., budget, facilities, support personnel, faculty, records, etc.

2707 PROGRAM FILE

The evaluation report and subsequent adjustment records are filed in the program file for storage purposes.

2800 CONDUCT COST ANALYSIS PROGRAM

This activity, a justification process, relates to the techniques of evaluating financial records in order to determine cost efficiency factors.

2801-2802 EVALUATE ACHIEVED PROGRAM GOALS AGAINST BUDGET EXPENDITURES

This activity requires the matching of stated and achieved program goals against budgeted and actual program expenditures. In effect, this activity justifies the cost for each program goal.

2802-2803 REVIEW ALTERNATE PROGRAM BUDGET PATHS

This activity relates to analyzing reasons for additional expenditures or reduction in expenditures and adjustments to any program budgets that were made during the operation of the program.

2803-2804 ANALYZE PROGRAM COSTS FOR UNITS, STUDENTS AND SUPPORT

This activity relates to the breakdown of program costs for instructional units, cost per students processed, cost per student hour, student instructional hour, and other support activities. In this process we are concerned with analyzing detailed record keeping and the breakdown of costing factors.

2840-2805 ANALYZE COST VALUES FOR FACULTY, FACILITIES, PROGRAMS AND STUDENTS

In this activity we are interested in obtaining a measurement of unit, hourly or fractional costs that will be used to achieve reasonable costs data. The measurement value is applied against the number of students processed, the faculty, facilities, and all other charges for each program in order to obtain a cost per instructional hour rate.

2805-2806 PREPARE PROGRAM COST ANALYSIS REPORT

This activity relates to the preparation of a cost analysis report which is equivalent to a profit and loss (P & L) statement as used in industry.

2806 PLANNING AND PROGRAM FILE

Cost analysis data and reports are stored in the planning and program file for future use.

2900 PREPARE AND PUBLISH REPORTS

This activity relates to all general reports that are prepared, published and disseminated by the administrative staff.

2901-2902 STUDENT REPORTS

Information stored in the student information file is generated into individual student reports that serve the student and faculty as well as any specific agencies that may demand information in future years.

2902-2903 STATISTICAL REPORTS

This activity relates to all statistical data that are generated within the system in terms of attendance, cost analysis, and like materials. Information is drawn from the community program faculty file. This type of statistical report serves the needs of the community for public relations purposes, the school board for information, and for action planning for the faculty.

2903-2904 MANAGEMENT CONTROL REPORTS

This activity relates to all reports that deal with the management control process. Information in drawn from the program and faculty files. This information is used primarily for school boards and the management team.

2904-2905 INTERNAL/EXTERNAL NARRATIVE REPORTS

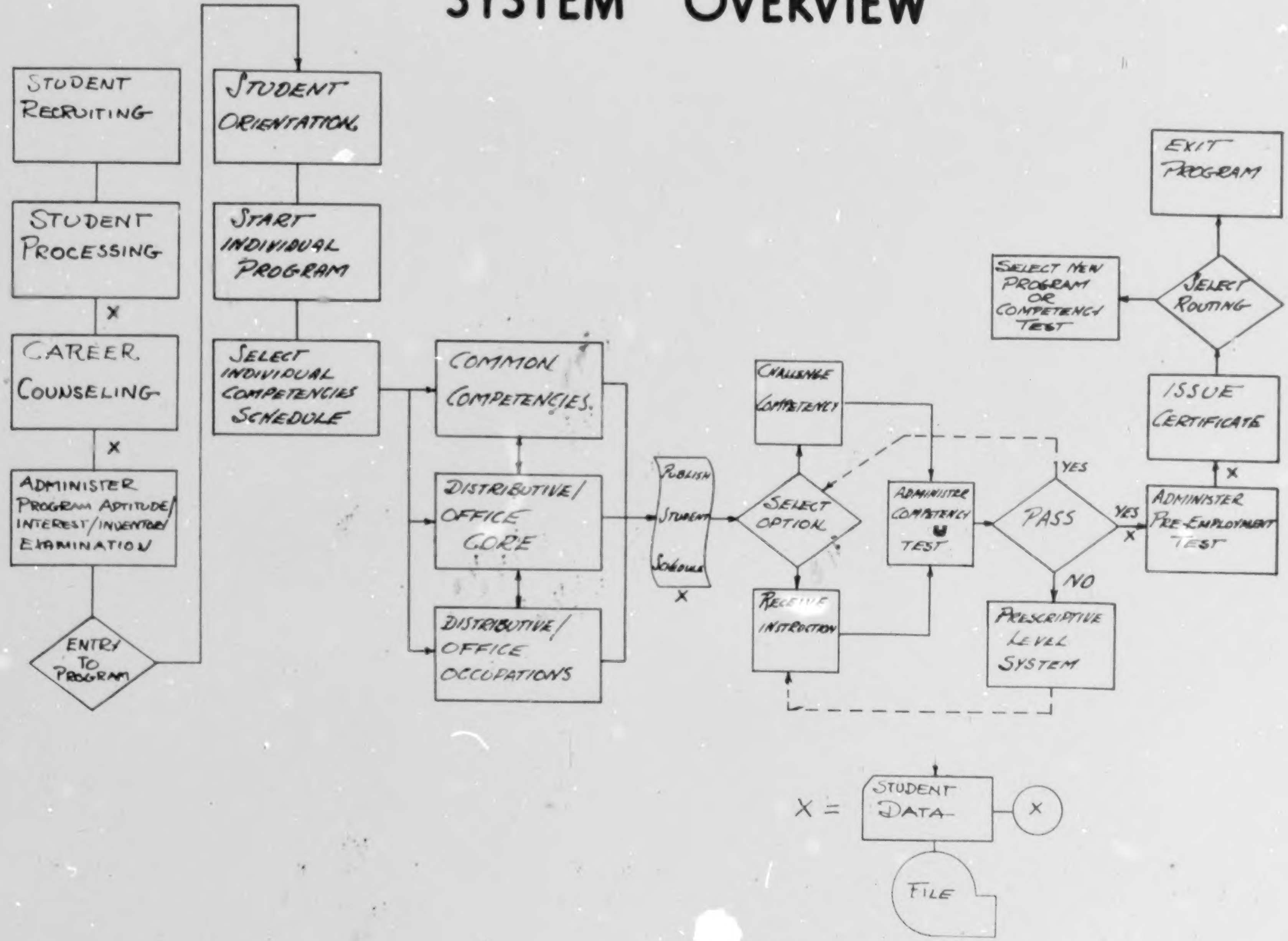
This activity relates to all narrative reports, internal guidance directives and information bulletins as prepared for internal and external dissemination. Information is drawn from the faculty program resource files and is distributed to: the community for public relations purposes; school boards for information and action; faculties; administration; curriculum for guidance and control; and to all concerned for planning purposes.

2905 FEDERAL/STATE FUNDING REPORTS

This activity relates to all reports that are mandated by federal and state programs and relates to the fiscal reporting procedures that are dictated by these agencies. Information is drawn from all files and is primarily disseminated to the funding agency, to the community for public relations information, and to the school board for action.

LEARNER SYSTEMS MODEL

SYSTEM OVERVIEW



BUREAU OF BUSINESS EDUCATION
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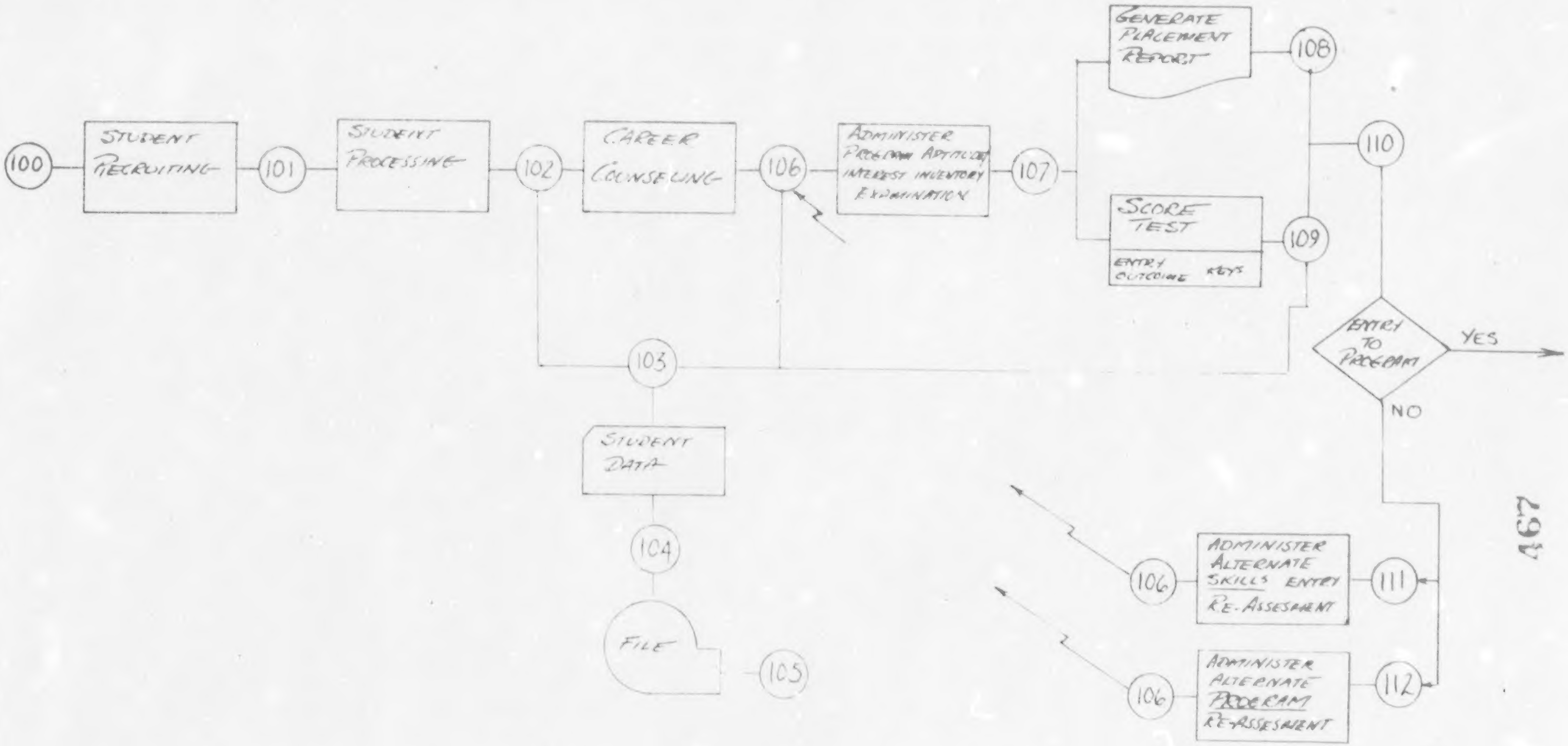
LEARNER SYSTEMS MODEL


100
STUDENT RECRUITING
101
STUDENT PROCESSING
102
CAREER COUNSELING
106
ADMINISTER PROGRAM APTITUDE INTEREST INVENTORY EXAMINATION
107
GENERATE PLACEMENT REPORT
108
SCORE TEST
ENTRY OUTCOME KEYS
109
110
ENTRY TO PROGRAM
YES
NO
103
STUDENT DATA
104
FILE
105
106
ADMINISTER ALTERNATE SKILLS ENTRY RE-ASSESMENT
111
106
ADMINISTER ALTERNATE PROGRAM RE-ASSESMENT
112

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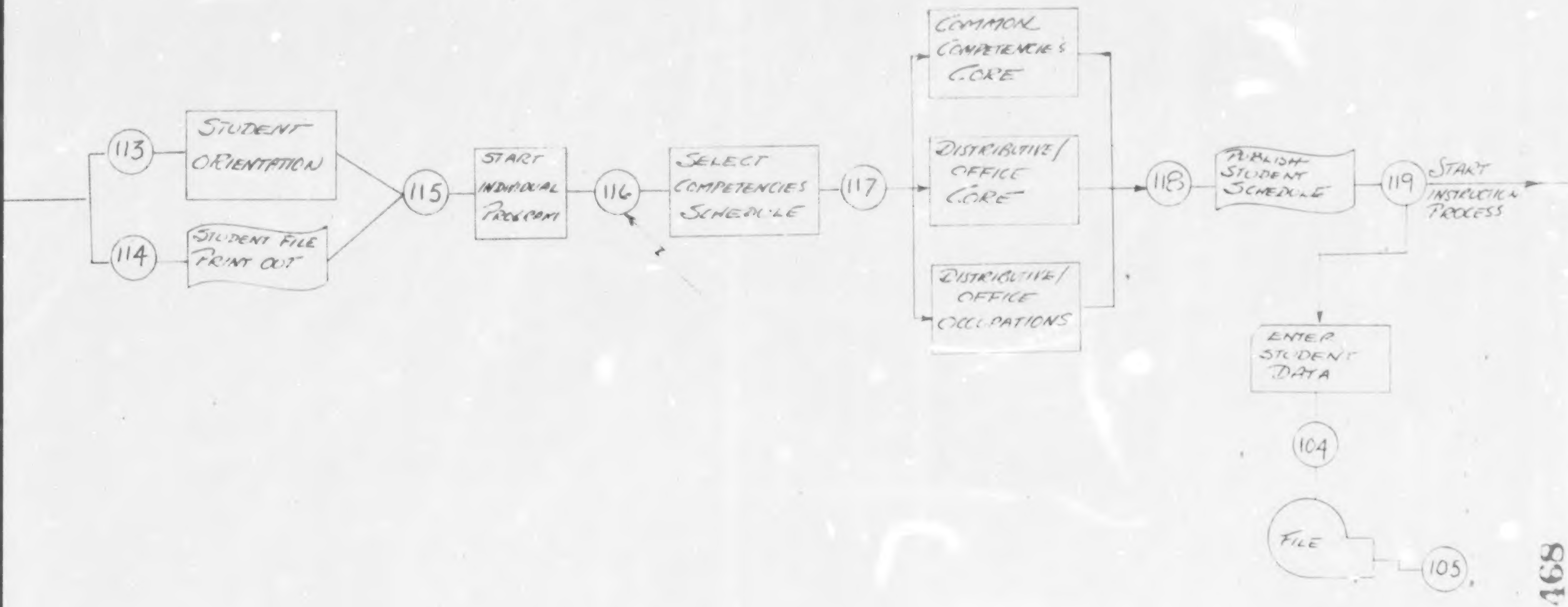

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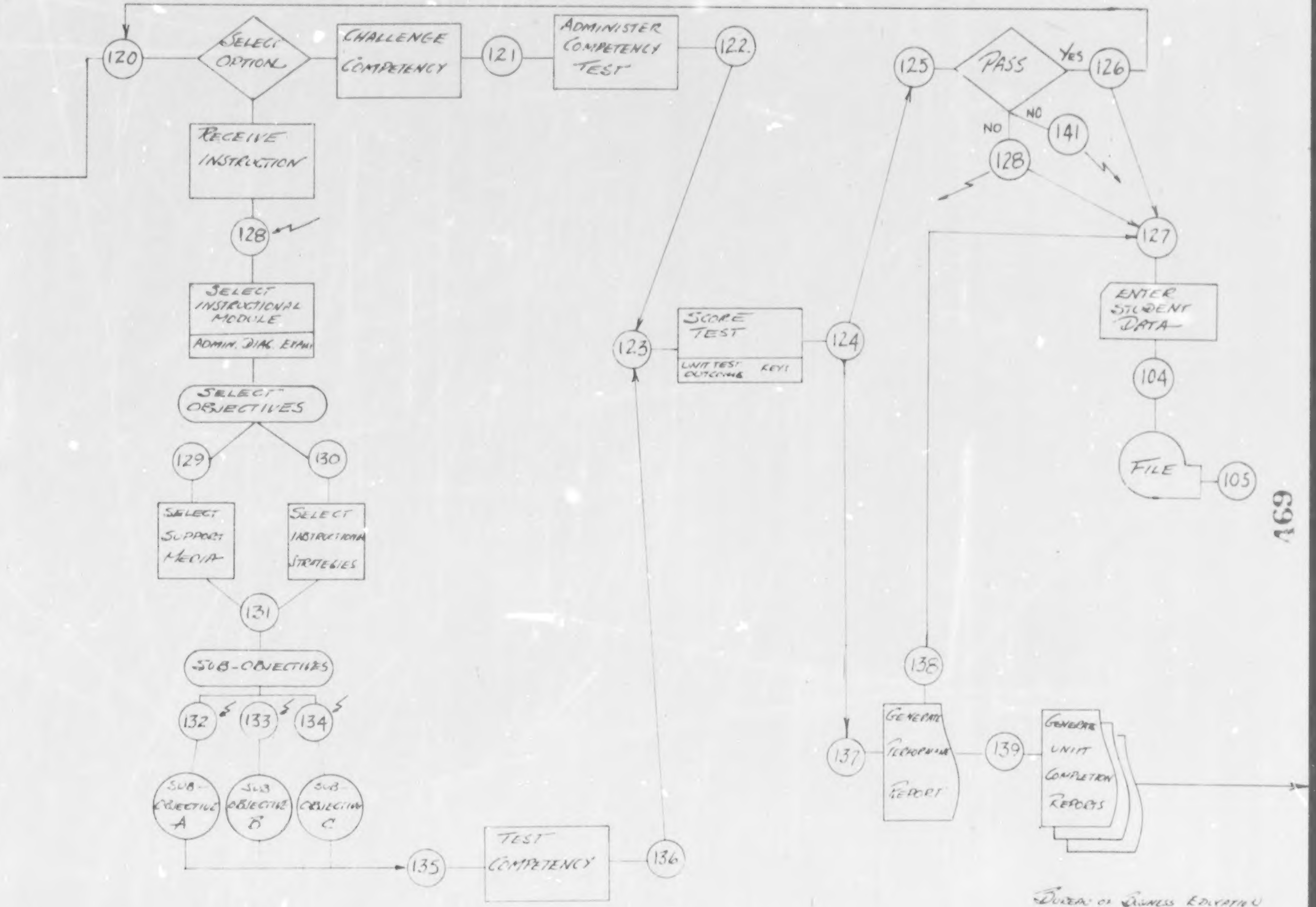

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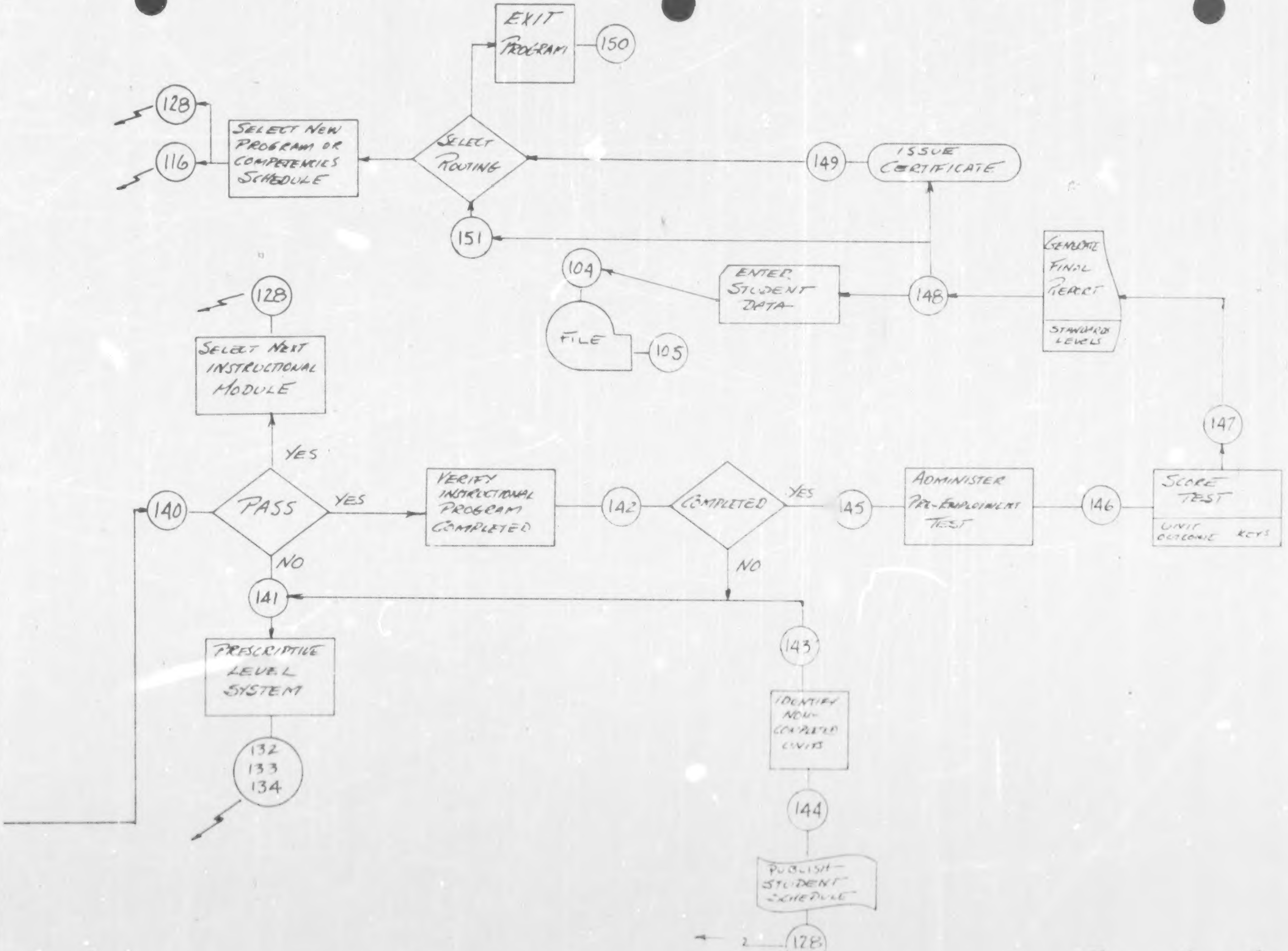

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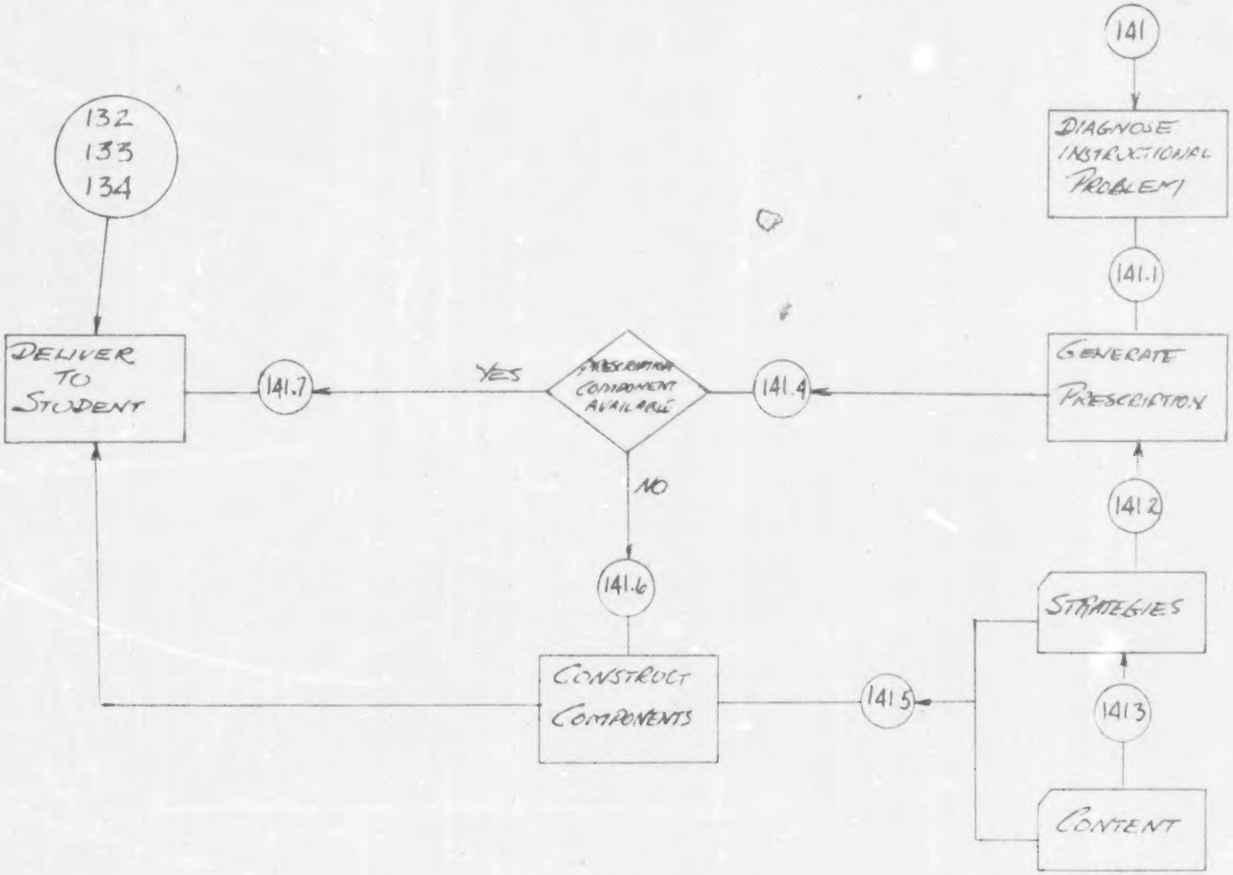
PRESCRIPTIVE LEVEL SYSTEM



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STRATEGIES

The section on strategies represents thoughts of the Task Force that could not be stated concisely enough to fit within the format of the Guide. In preparation for writing the Guide, a thorough search was made of ERIC, periodical literature, theses, and dissertations in an attempt to find the most effective ways of teaching the competencies needed for office and distributive occupations. The findings from the literature and from the experience of the Task Force members were incorporated in the instructional ideas; however, certain concepts recur. To expand an idea, to reinforce a method, to answer questions, to serve as a catalyst - for these reasons the following essays were included.

Individualized Instruction
Mathematics
Methods for Distributive Education
Shorthand
Simulated Office
Student Store Operation for Distributive Education
Testing
Typing

INDIVIDUALIZED INSTRUCTION

The California Business Education Program Guide for Office and Distributive Occupations was based upon the premise that instruction can be custom-tailored so that it fits a particular learner. This means that a student can proceed at a pace commensurate with his ability and that a student has an opportunity for communication with the teacher. The Task Force recognized that it would be no easy task to organize for individualized instruction; yet, those who have tried are convinced that behavioral changes can be observed and evaluated and that students can be stimulated toward a mature and conscientious determination to learn. Under the limitations of conventional teaching, instructors seldom have had time or opportunity to do what they can do best: (1) diagnose learner difficulties; (2) interact with students when they need help on a one-to-one basis or in small group discussions; (3) inspire and motivate; and (4) identify and encourage creativity and self-direction on the part of students.

Individualized instruction is not turning students loose to learn by themselves in isolation; neither is it a process of plugging students into a piece of instructional media. Individualized instruction should not be confused with independent study, which describes a learner engaging in his own pursuits with or without the guidance of an instructor. Usually independent study involves a bibliography, but there are few if any materials prepared for the peculiarities of the student.

The goals and objectives of individualized instruction are specifically stated, and activities generally involve a mix and match of reading, group instruction, tutoring, and multimedia forms of learning. The teacher is not replaced by machines or materials; rather the teacher uses data on the progress of the learner for decision making. The teacher becomes guide, synthesizer, evaluator, and creator of unique materials for students with varied learning abilities. The teacher is responsible for guiding a student through materials, activities and experiences appropriate to his level of learning and for providing alternative opportunities for all students.

Although certain innovations such as modular scheduling may enhance the opportunities for individualizing instruction, individualization can take place in a traditional setting. It is not dependent upon a schedule or building, but rather requires a philosophical commitment to taking a new look at media and mediation processes with the teacher supplying alternatives among forms from which the learner selects those which suit his style, abilities and goals. Change always involves some risk, but educators have long advocated "taking individual students where they are and moving them as far as they can go."

This statement can become a reality by:

1. sequentially establishing objectives in stated behavioral terms;
2. diagnosing student achievement in terms of the objectives;
3. prescribing the learning tasks that the student is ready to undertake;
4. providing materials with a variety of paths for mastery of any given objective;
5. including strategies for continuous evaluation and feedback for teacher decision making.

MATHEMATICS

When teaching math skills, make the material relevant. Teach only the material that is necessary to accomplish a particular skill level. After the particular skill level has been achieved, offer supplemental material for enrichment.

Teachers, as a rule, are overzealous in teaching mathematics. They constantly present material to students because "it is good for them to know," even though most of this material will never be used by the student during his lifetime. Or, teachers bombard the student with very large numbers under the pretense "if he can work with large numbers, he can always work with smaller numbers." When using this method, they usually fail to give the student time to build up his confidence working with smaller numbers.

The lecture approach with students working problems from the text, by itself, is probably the most ineffective method of teaching mathematics--especially with high school students working on remedial skills. Those teachers who feel they have the best success with this method should use applied math textbooks. They should also consider using workbooks to supplement the text. The problem with the text approach is that after page 93 comes page 94, and then page 95, etc., which is usually the way the student views it.

These methods have a tendency to teach students to dislike mathematics. As a result, they "tune out" when we are trying to teach them the basic skills. Math has become boring to them, so they put in their time doing just enough work to satisfy the teacher and get through the class.

If the student is going to develop mathematical skills, he must have a reason for doing so--his reason, not the teacher's! It is important, then, that the teacher motivate the student to want to learn. He can do that by using a variety of instructional strategies. He should never use any one method exclusively. The teacher will discover that if he uses one strategy for too long a period of time the student will once again become bored. Through overuse, that strategy no longer holds student interest.

Students learn by doing. Therefore, whenever possible, the teacher should provide him with hands-on learning situations such as using the chalkboard, math labs, projects, math games and puzzles, etc. The more actively involved the student is, the easier it is for him to learn. It is too easy for him to daydream while sitting in his chair listening to a teacher explain a procedure or problem. It is much easier for him to concentrate when he is actively working on a problem himself. Of course, the teacher must explain certain concepts, but as soon as he has done so he should get the student involved in working with that new concept.

METHODS FOR DISTRIBUTIVE EDUCATION

Each of the following four methods is being used successfully in distributive education programs. Location and size of local businesses, as well as funding available are important factors in determining suitable methods for a given program. In large schools, more than one method may be used. All of the methods require major commitments on the part of the teacher-coordinator and can prove to be very worthwhile.

COOPERATIVE METHOD

In the Co-op method, the program consists of an in-school class with both group and individualized instruction and the placement of the students in training stations where they work on a regular basis, are paid, and practice their class-learned skills and skills learned on the job in working toward their career goals. This traditional method is often used in the second year of a two-year program, and requires a local business community that both can and will provide real training stations, i.e., assign sponsors, work out training plans, etc. The advantages of a student working in his career area with a training plan are obvious; the disadvantages are that this may not be possible for each student, the student may not have a real career objective, or the training station may not be able to do more than provide a part-time job where real training is minimal. Nevertheless, when possible, this is the ideal method.

PROJECT METHOD

The Project method is a much more recent attempt to bring reality to those areas where local business conditions make Co-op impossible. In this method an in-school laboratory is set up where a carefully planned sequence of experiences may be offered the Distributive Education student. This simulation may extend to using local businesses as resources or may be self-contained. Sometimes the Project method is used as a preparatory course for students who then go on to Co-op, in lieu of Co-op for those students unable to get training stations, or as the entire program. The advantages of the Project method include the opportunity it gives to offer the student a much broader experience than a business can, while at the same time individualizing instruction and favoring experience over just understanding. Unfortunately it can not offer experience with the same atmosphere as a business has, nor pay, nor the status that comes with actually working so it has less scope for changing attitudes or motivating students. It can also be extremely expensive to set up.

SCHOOL STORE

A school store, on the other hand, is real. Students perform all or some of the normal merchandising functions, including the training of other "employees" and supervision. Usually the work performed in the store is done on class time, without pay, but with grades dependent on the work accomplished. (Often these are given in the form of a paycheck.) School stores are normally used in connection with a regular Distributive Education class since a student needs a good deal of background in at least core skills to run a store. Frequently advanced students are the ones who manage the store, with beginning students starting in the beginning jobs as soon as they can qualify. The advantage of allowing students to take the responsibility for training and supervision, which would be impossible in a regular training station, is a great one, and a school store also has opportunities to offer school services which can be both morale building and maturing opportunities for the D.E. student. Moreover the profits can and should be used for DECA activities. But this method is extremely time consuming and requires space, capital, and administrative support.

COMMUNITY LABORATORY

Probably the newest method for individualizing instruction and coordinating in-class learnings with on-job experiences is the Community Laboratory. Often set up so the classroom itself is in or near a shopping center or downtown area, the program includes in-class instruction and placement in various jobs in various businesses as a learning laboratory for both practice and the teaching of those skills, understandings, and especially attitudes which do not lend themselves to classroom work. Usually this program is done in two-hour or even three-hour blocks, often with students coming from several high schools by bus. When this is used in connection with a regular Distributive Education program, it is often considered to be the necessary link between preparatory and cooperative work, especially for students identified as needing special help. In some areas it is the whole Distributive Education program, with students moving from laboratory work to paid cooperative work as they become employable. The major advantage of this method is that it has proved to be the shortest link between unemployability and employability for many students; the taste of actual experience increases their motivation to learn required skills enormously. A major disadvantage is the care the teacher-coordinator must exercise to prevent any kind of exploitation of the student and to meet present laws, which require that a student may do no productive work. This has meant that teacher-coordinators need carefully graded training plans and a training station rotation system.

DISTRIBUTIVE EDUCATION CLUBS OF AMERICA

Whichever teaching method is used, however, the one great supplement and motivational factor in the Distributive Education program is the DECA Club. Offering scope to advance far beyond a beginning job experience, status, fun, and opportunities to meet, work with, and learn from many business people, no DE program should neglect DECA. There is no method for a student to really expand his personal horizons, mature, and receive credit for his accomplishments that comes close to it.

SHORTHAND

Educational emphasis has been swinging toward having students obtain an employable skill before high school graduation. Statistics show that even during times of high unemployment there is a continual need for qualified stenographers. These two trends challenge office educators to make shorthand instruction relevant to a large number of students.

Some organizational changes being made are: flexible scheduling, individualized instruction, and new learning modes. There are many proponents of providing the opportunity for shorthand students to progress at their own pace, meeting the challenge of one's own goal rather than competing with others. The emphasis is transferred from teaching to learning, from group conformity to individual progress. Some schools have begun to adopt the "pass/fail" or "credit/no credit" policy of grading. Records are kept only of the passes and the level of speed and accuracy. Employers can relate better to proficiency certificates or statements that provide data on shorthand speed levels, transcription rates, and accuracy percentages than to grades representing standards that are not specified.

To learn shorthand, students must be able to comprehend the sounds and meanings of words, to listen carefully, and to create symbols with control. To prepare students to learn shorthand, some attention needs to be given to these skills required in the learning process. Since shorthand is based upon sounds, a review of or introduction to phonics may help students. A phonetic background will add to a student's success in reading shorthand words. Asking students to give shorthand character sounds rather than naming the shorthand character applies phonics to the reading process.

The emphasis should be placed on the listening skill during the early stages of shorthand skill development rather than on the transcribing skill. Typing improves as the student becomes familiar with the process. Rough drafts are particularly appropriate in the beginning stages. Students can bring their own interest articles and produce "think" sheets for them.

The introduction to shorthand theory seems to be a critical time. As student abilities in shorthand reading comprehension and writing begin to spread, grouping and individualization of shorthand instruction become appropriate. Pacing students and counseling are imperative. Target dates are helpful.

Laggers need special attention and independent tutoring may spur them on. The use of student tutors has come into vogue with the concept that in order to learn something well one must teach it. When individual students begin to fall behind, they can be recycled by repeating lessons or by using a different set of materials. Recycling may be accomplished through a programmed or optional text. Small groups of students may assimilate theory at a comparable rate, thus the instructor may present the theory at several different paces - for some students, a lesson a day; for others, a lesson every other day.

Multimedia materials provide flexibility for the shorthand program. Listening laboratories with multi-channel stations or single playback units can be used. There is an abundance of commercially prepared tapes and records which include theory, theory review, speed development, letter dictation, and office-style dictation. Teachers can develop their own tape library by running the tape recorder during classroom dictation or instructional presentations. The availability of the laboratory encourages students to use the tapes whenever they have unscheduled time. Shorthand materials should be incorporated in school learning resource centers. Teacher aides can be trained to assist students in the use of the materials and equipment. In addition to dictation listening activities, students may transcribe from the notes or replay a tape, reading his notes.

To avoid monotony, a variety of activities should be scheduled during the group-instructional time. Live new-matter dictation can begin the first week of instruction. Longhand or typewritten transcription can be used effectively very early. Speed reading goals stimulate student participation; students may be paired according to their reading progress. Games tend to bring about group dynamics that contribute to learning; i.e., shorthand spelling bee, bingo, crossword puzzles, team writing of words on the board, timed copy of shorthand. Miss Eleanor Skimin, retired professor at California State University, San Francisco, developed a "Communication Process Method" which has been used successfully by some teachers. The student was given a duplicated copy of a newspaper or magazine article of approximately 100-200 words, and a cassette tape containing the instructor's analysis of the article relative to spelling, punctuation, capitalization, word usage, pronunciation, meaning of words or phrases, and sentence structure. The student was expected to do the following which appeared on a student activity checklist:

1. Read carefully the complete article for meaning.
2. Listen intently and think with the language analyst.
3. Dictate the article from printed copy into a blank tape.
4. Transcribe from student's own dictation without referring to the printed article.
5. Proofread typing before removing from the typewriter and correct errors.
6. Evaluate typed copy.

There is a relationship between vocabulary difficulty and the speed of writing. If a student can automatize the most frequently used words, new-matter dictation becomes easier. Silverthorn, West, and Perry studies provide lists of the most frequently used words in business.

Standards need to be set for instructional activities so that a student may compare his achievement. In the survey conducted by the Task Force, minimum requirements for entry-level stenographer positions ranged between 60 and 100 words per minute with a high level of accuracy; 80 words per minute was the modal response. Overlearning of a skill tends to insure retention of that skill at a slightly lower level; that is, a skill of 100 words per minute in the classroom will likely be retained at 80 words per minute on the job. Transcription standards indicate a requisite rate of 20-25 words per minute. Transcription drills from printed shorthand copy are helpful in boosting transcription rates. Transcription is not something that can be taught at the end of shorthand development - it must be a concurrent theme.

Lloyd ("Transcription," Changing Methods of Teaching Business Education) recommended a real-life approach to make transcription easier. This approach provides the student with data about the dictation through the use of a story line and practice on a typical letter from a cluster of letters related to the story line. A stenographer on the job has access to many letters from which she can study vocabulary and frequent phrases; providing students with letters for preview is realistic. In the instructional process, the student will need feedback on proper outlines. Transparency keys and the use of the shorthand dictionary are useful. The instructor should call attention to transcription pitfalls. Clusters should be designed to provide the student with a systematic reinforcement of theory.

Dictation in the style of a sympathetic employer who watches his stenographer for signs to slow down or speed up, spells unfamiliar terms, and places the stenographer at ease whenever possible can be used productively in the classroom. The teacher can dictate some of his own correspondence in this manner to students. With this experience, the student can become adept at taking dictation and producing transmittable copy with relative ease. Rush or pressure-type dictation situations can also be simulated.

As the teacher encourages each individual in his progress toward shorthand competency for the position of stenographer by varying the instructional process, greater numbers of students should be able to achieve this skill.

SIMULATED OFFICE

Rationale. To provide synthesis of office skills training, students need the opportunity of applying their knowledge in an office-style experience. This experience can be brought about by work experience outside the school; however, in-school facsimiles of business provide a transition from instruction to production and allow students to fill in gaps in their skills. The simulation of an office or use of a live office demonstrates to students the integration of office functions. Thus, the simulated office becomes a vehicle to assist the student in applying all of his skills as he participates in the work flow of an office. The student is no longer isolated from his peers; he contributes to a joint effort, necessitating that his work be accurate and prompt. Initiative and tact become requisites for smooth operations.

Advantages and Disadvantages. It is possible to create an attitude appropriate for the office by creating an office atmosphere. Students become responsible for their work and learn to work together. In a controlled situation, students follow proper procedures and receive on-the-job training. Students are attracted to the program. Some students have difficulty working without direct supervision of a teacher and are unable to accept another student as their supervisor. Some students may not take the work seriously, or they may become bored if they learn their job quickly and do not have the opportunity to transfer immediately. It is possible to become caught up in the processing of orders day after day without bringing in a variety of activities.

Equipment. The minimum equipment needed to begin a simulated office includes: typewriters, 10-key adding machines, filing cabinets, desks and chairs, plus a copying machine, mail scale, stapler(s), collator and other miscellaneous supplies. The use of office desks, time clock and cards, and the availability of telephone equipment adds to the office atmosphere.

Simulation Materials. **Ready-to-use materials are commercially available. Also, teachers have developed their own materials for simulation by working with local employers. Some suggestions for teacher-prepared simulation are:**

- Write an employee handbook with company rules, benefits, job descriptions, flow charts of work flow, working procedures correlated with the flow charts, and sample forms filled out to demonstrate proper procedure.

- Include a sales department, office services department, accounting department, and "outside world." Each department should have a student manager as well as other appropriate positions.

- In addition to using standard office forms such as shipping orders, invoices, credit memos, the employees should apply for a position on an application form, receive a payroll check, and be evaluated on an employee performance rating sheet.

- Create a master list of orders with extensions and totals so that invoices may be verified by the customers.

- Use an offset or mimeograph to produce materials; also obtain forms from local businesses.

- Do not let the office become a papermill; use extra problems such as customers who fail to pay their bills, sales promotions, sales analysis, cost analysis, borrowing money, etc.

- Do not use the terminology of a class; use business terms.

Live Office. This hands-on multi-clerical plan functions as an office service for certificated teachers/non-profit groups in the community. Using an office organizational concept, the live office may be divided into four departments--Administrative, Accounting, Duplicating, Steno and Typing Pool. This departmentalization emphasizes the ability to work with people as a team effort is required. A student entering the live office situation makes application, is interviewed, and receives office orientation. A correlated instructional plan is usually planned in conjunction with placement. A trainee may investigate an area by holding only one position in a department, or he may specialize by holding several positions. As student employees transfer to new positions, they initiate their own replacements into the position being vacated.

Customers bring to the live office their requests for clerical, typing, and duplicating services. Each job is carefully logged in by the receptionist and assigned to the trainees for completion. Effectiveness is judged by the return of customers and satisfaction expressed by those served. Office standards of quality apply. Output is not graded by "one wrong, A-." Output either meets the standard of acceptability or it doesn't and must be redone. Customers are billed by the Accounting Department on a 30-day credit basis. The customer is requested to pay his account in-kind; e.g., 30 sheets, 20 weight, green, 8½" x 11", spirit duplicating paper and one master. Supplies are thus replenished without handling cash.

Credit may be granted on the basis of the number of hours clocked in, on the quantity of work completed, or on the accomplishment of objectives.

Spin-off. The spin-off instructional strategy is not a simulated office situation in that there is no attempt to include work flow or interpersonal relations; rather the student works individually at a model job until entry-level skills are attained. In this plan, a student with minimal or no office skills begins with a spin-off from the general clerk cluster of positions; i.e., mailing clerk, file clerk, receptionist and information clerk, office cashier, adding-listing and calculating machine operator, et al. As soon as he masters the skills for one model job, he moves on to one of the other model jobs in the general office clerk cluster.

STUDENT STORE OPERATION FOR DISTRIBUTIVE EDUCATION

To make a distributive education program complete, both a student store and a DECA chapter are recommended. These two strategies will gain and hold student interest for classroom instruction involving merchandising, salesmanship, advertising and other distributive topics. School size doesn't matter; anyone can have a student store.

In a school store, students receive valuable experience by counting money, balancing the cash, writing sales checks, taking inventory, maintaining store security, advertising, preparing displays, and practicing honesty and loyalty.

In planning a student store, involve the students. Be selective in determining the store location, considering ample space to allow students to walk in and handle the merchandise. Use a variety of items to challenge distributive education students in selling and also to appeal to the student body as customers. Allow students to select the merchandise; then they must sell it. The teacher, needless to say, has the responsibility of guiding and coordinating the final business transactions with sales representatives.

Some items that have been successful in student stores are: t-shirts, sweaters, posters, earrings, leather goods, school banners, some school supplies, paperback books, panty hose, popcorn, candy, gum and records. Have some of the t-shirts, sweaters and school supplies labeled with the school emblem so the merchandise differs from the local town merchandise. A coke machine and a juke box are excellent attractions for students and provide added income. Do not overlook tickets, gym clothes, and various items the school business office may be handling. The experience is excellent for students and wins respect for the program.

In learning "merchandising math," students are usually bored with the process of discount, markup, interest, and percent; however, a student's interest comes alive when given an order for t-shirts, or a carton of posters to inventory, price and figure the profit. For handling money, use a cash box for the edible items and a cash register for all other items.

If the distributive education students operate a store, they should receive the profits. This is an excellent method of financing a DECA chapter. When students have goals to work toward, many hours of a student's free time will be spent working in the store. Ideal opening time is the hour prior to lunch and continuing until the school day ends.

A student store is a major project, but most sponsors find it worth the effort when student learning and growth are considered.

TESTING

The ideal individualized program of instruction rests heavily upon adequate testing and diagnosis. Within the various competency modules, reference is made to tests which have helped business teachers in prescribing a learning program that helps students achieve the desired competency. To supplement these references, professors at California State University, Sacramento, who have specific expertise in tests and measurements have been consulted for their recommendations in conjunction with a thorough research of testing materials.

The purpose of the research on testing was to answer thoroughly a series of questions regarding the availability and reliability of tests relevant to the CBCE program. The questions were: How can aptitude, achievement, and diagnostic tests be used for the office and distributive occupations? Specifically, what reliable clerical and distributive tests will provide data relevant to an individual's aptitude for the selected jobs of: cashier-checker-bagger; salesperson, general; service station attendant; waiter-waitress; general office clerk; clerk-typist; and stenographer? Which achievement tests can be suggested for the mathematical computations, business English, or spelling skills needed to perform these jobs? Are reliable diagnostic tests available in these areas? Are there employment tests which can be used to validate student competencies? The conclusion that the state of testing at this point in time is far from complete is evident. The following is a discussion of the findings that are applicable to the program.

Aptitude Testing. It is important to remember at the outset, however, that aptitude tests tend to be valid for training, but not for performance; that is, they can be used to predict success in training better than they can be used to predict success on the job.

The first aptitude battery that might be considered is the Differential Aptitude Test (Psychological Corporation, 304 East 45th Street, New York, New York). Eight tests are designed to measure the aptitudes of Verbal Reasoning, Numerical Ability, Space Relations, and Abstract Reasoning, the abilities of Clerical Speed and Accuracy and Mechanical Reasoning, and the proficiencies of Spelling and Sentences. The last two, spelling and sentences, are achievement tests and can be used as indices of promise.

Verbal Reasoning and Numerical Ability (Arithmetic Computation) may be combined to make a good test of general intelligence. The numerical ability test can also be used to predict success of future mathematics grades, especially those math courses involving arithmetical computation rather than reasoning skills. The Clerical Speed and Accuracy Test is designed to measure perceptual accuracy and speed of response. It requires the student to make quick comparisons of arbitrary patterns of letters and numbers. The Language Usage Test may also be utilized to check a student's spelling and usage of grammar, and as a measure of achievement as well as of aptitude.

In general, the DAT has excellent reliability and validity, which incidentially is not true of many tests currently on the market, and has been carefully constructed. Several of the tests are rather good predictors of academic success in school and college and of the occupational level attained after completing formal education. However, the DAT may be more useful in predicting future academic success than in predicting future vocational success. Course grades are predictable, and achievement test scores even more so.

Unfortunately, the manual does not present any data concerning the appropriate combination of scores which sets one occupational group apart from another or the contribution a particular test makes to identifying people in a particular occupation. By studying the information the publishers furnish with this test battery, a teacher or counselor can find out what predictions are possible and how definitely they can be stated. The advantage of this test battery over a single measure of general intelligence is that it is more likely to reveal for each student some assets he or she can count on in planning for the future. Also, norms for all tests are based on the same representative group of people. Thus, scores that show where an individual stands in relation to this norm population are comparable from test to test and one can state with assurance that an individual ranks higher in clerical speed and accuracy than in Abstract Reasoning.

The second aptitude battery that is suggested is the General Aptitude Test Battery (United States Employment Service, U.S. Government Printing Office, Washington, D.C.). This battery should be considered because there is no doubt but that this is the most adequately standardized and validated battery of tests now available for the vocational counseling and placement of inexperienced young persons and adults. It is particularly useful, because of its norms, with non-college students. The availability of conversion tables which permit comparing an adolescent's scores with adult occupational norms extends the usefulness of the battery to all age groups needing directional vocational guidance, although caution needs to be exercised and developmental trends understood. There are 12 tests in the GATB, measuring 9 factors. The paper and pencil measures are suggested only, without using the apparatus tests that are available. Some of the paper and pencil tests would be particularly useful for business education students; for example, the Name Comparison (a test resembling the Minnesota Clerical Test), Computation (consisting of addition, subtraction, etc.), Arithmetic Reasoning (verbally expressed arithmetic problems), Vocabulary (a same-opposites test), and clerical perception (ability to perceive pertinent detail in verbal or numerical material, to observe differences in copy, tables, etc.). The GATB norms are expressed in terms of occupational aptitude patterns. Cutting scores are established for each of the three most important aptitudes found to characterize a group of related occupations. The establishment of cutting scores is based on the finding that the bottom third of the distribution of workers in most occupations is not very successful. Reliability is quite satisfactory for the paper and pencil tests, but barely acceptable for apparatus tests. Validity data is adequate, but the user of the GATB needs to pay particular attention to the type of occupational group used in validating the battery for a particular occupation. In some cases they are students, in others, employees, apprentices, or trainees. Nevertheless, the GATB is one of the most useful tools available with inexperienced and untrained persons who need help in finding a focus for their efforts in securing training or beginning employment, particularly in the middle and lower level occupations.

Reading. One test recommended for reading is the Stanford Achievement Test: High School Reading Test (High School Basic Battery) (Harcourt Brace Jovanovich, Inc., 757 3rd Ave., New York, New York). This is a fine survey tool for determining reading comprehension. The test can also be converted into a semi-diagnostic instrument by developing an answer key which clusters together those responses which appear to be measuring the same sub-skill. Such an evaluation may give the teacher some rough insights into strengths and weaknesses which need further evaluation. Norms and content validity are established, but a school should compare the content of the test with the content of the school curriculum to be sure that the test is an appropriate measuring device for the instructional objectives of that particular school. This test ranks as one of the very best survey tests of secondary school reading achievement available today. It has been carefully designed, broadly tested, and well produced. It adequately serves the objective of providing a rough measure of reading achievement for comparative purposes and as an instrument of identification upon which further evaluation of reading strengths and weaknesses may be based.

Another recommended test (easily administered) for determining reading level is the Slosson Oral Reading Test (Slosson Educational Publications, 140 Pine St., East Aurora, N.Y.). This test has been specifically recommended for the assessment of a student's reading level, so that appropriate steps can be taken to diagnose and provide a remedial program if necessary. Administration and scoring time is 3 minutes, total.

Mathematics. Individuals in the clerical and distributive occupations need the ability in math to add, subtract, multiply and divide whole numbers and decimals. This includes knowing basic addition-subtraction facts and also multiplication facts. Also, many of the jobs in the areas demand an ability to "make change."

The Numerical Ability test of the Differential Aptitude Test may be useful in assessing a student's computational skills, and helpful in determining what further skills he or she needs to develop more adequately in an attempt to maximize his chances for success. The Computation scale on the General Aptitude Test Battery may accomplish the same purpose and additionally may provide data which allows for student score comparison with an occupational cutting score. There appear to be no appropriate achievement tests available in mathematics. Also, little research on the effectiveness of group diagnostic tests in arithmetic has been reported. Even the individual diagnostic tests are lacking in adequate construction, validity, and reliability considerations.

Clerical, Stenographic, and Sales Tests. No tests could be found that are recommended for use as achievement or diagnostic tests per se in the distributive and clerical occupations. The current tests on the market are relatively useless in this regard.

In sales jobs, the most efficient index of sales effectiveness has been the sales key of the Strong Vocational Interest Blank. The SVIB has been found to predict success in sales jobs.

Use the clerical sections of the DAT and the GATB to identify potential in stenography and general typist/clerical occupations.

English--Vocabulary Tests. The Durost-Center Word Mastery Test (World Book Company) has been used for grades 9-12 to determine vocabulary (Part I), vocabulary in context (Part II), and use of contexts (Part III). As a general vocabulary test, Part I is highly satisfactory. Words were selected so as to be representative with respect to source, parts of speech, and social utility, and they were submitted to an adequate tryout. In Part II, the authors recommend basing instructional follow-up primarily on the results from Part I and use of context scores. As a vocabulary test, either Part I or Part II is eminently satisfactory. The difference between the part scores (Use of Context) is probably too unreliable to be of much significance.

Specifically, the following recommendations for a testing program in the clerical and distributive occupations are made:

1. Utilize the tests you select from this review that will meet your needs for assessing the aptitudes of students in reading, mathematics, business English and spelling. There are adequate measures of aptitude available.

2. Develop your own achievement tests which will measure the performance you would like students to attain. Presently, there are few adequate tests of achievement available for general skills such as math, reading, spelling, and English and no good achievement tests available for the clerical and distributive occupations.

3. Use any disgnostic tools which are available (as mentioned in this report) and develop your achievement tests in such a way as to utilize them in a semi-diagnostic manner for the identification of strengths and weaknesses of individual students.

TYPING

Typewriting is one of the major competencies that students in the office career education program must develop. It is "major" because it is an important job requirement and because it takes a considerable amount of time to learn. The task force concurred that 80 to 90 percent of all students who enter the typing program should be able to reach the minimum skill levels of the typing objectives in the Office Core section and, further, that the likelihood of success is greater if individual progress instruction (IPI) is made an integral part of the program.

Does IPI Work? There does not appear to be any clear cut answer to that question. It is fair to say that an increasing number of teachers are shifting to some form of individualized instruction. Evidence of this is the number of commercially prepared materials now being offered to assist teachers who are trying to individualize their programs.

There are no definitive research designed and statistical studies to justify this move--but there is much classroom action research by teachers that suggests that this is the direction in which we should be moving.

How Much IPI and When? Many teachers express concern about the development of good technique and work habits under IPI. There does seem to be cause for concern here, and some teachers have sought to deal with it by delaying IPI until after basic skills have been introduced and developed through teacher directed activities.

How long **a delay ?** From the time standpoint, five to nine weeks is typically required to develop basic keyboard control and the ability to center simple material vertically and horizontally. Some students are ready to move beyond basic skill development when they can type average straight copy at a rate of about 25 gwpm for five minutes with average accuracy of about 2 errors per minute. Thus, some teachers are switching students to IPI at the point in time these basic skills have been developed.

How Can IPI Be Achieved? First, and this is not inconsequential, a teacher must be deeply committed to meeting the needs of individual students. If this commitment isn't present, the extra hours of work and the frustrations encountered will defeat one very early in the game.

Assuming that commitment, then, what must be done?

(1) Study professional literature for new ideas for teaching typewriting--more and more of which seem to be IPI oriented. The items listed in the bibliography for this paper are by no means all-inclusive but have much of value to consider.

(2) Visit one or more schools that have IPI programs. The Bureau of Business Education can help locate these schools.

(3) Examine the commercially prepared and teacher prepared materials already available. Evaluate them in terms of the objectives of the typing program.

(4) Plan a total typing program. Try simple flow charting to help trace the intermediate steps students will follow to meet the terminal objectives. Match the available IPI materials to the steps in the flow chart; then list the gaps that will have to be filled by materials that the teacher will have to create.

(5) Get administrative support--including monetary support--at about this point.

(6) Begin development of materials and order commercially prepared items. All materials need not be complete before the first student walks through the door, but should be available at least four weeks ahead of the fastest student.

(7) Begin program with enthusiasm. Take careful note of problems so that they can be eliminated the next time around.

(8) Enjoy the pleasures of working closely with individuals!

What About Commerical Materials? Publishers are making more and more printed materials available that are designed for IPI. Multimedia instructional units are also available. Traditional practice sets can be easily adapted to an IPI program.

What About Teacher-Prepared Materials? Many teachers already engaged in individualizing typewriting instruction have found it both necessary and desirable to create their own instructional materials. Some of these are complete in themselves; others are correlated with established typewriting textbooks. Many of these teacher-prepared materials are available through the Business Education Data Dissemination System of the Bureau of Business Education of the California State Department of Education. All typing items in BEDDS are coded 14.09. It may be that some of these would be usable exactly as they were written; but even if they are not, it is worthwhile to acquire copies of those titles that might be suitable as a guide in writing new materials.

Do not overlook the possibility of preparing audit tapes, slide/tapes, 8MM film loops, and even video tapes. The cost in dollars and time is significant, but the potential results make it worth consideration.

What About Standards? It is unrealistic to set an accuracy standard of 1 error per minute on straight copy timed writings. Studies by Robinson[1] and the San Mateo Union High School District[2] indicate that first year typing students actually make 1.5 to 2 errors per minute on five minute timed writings of average difficulty. The San Mateo study also found that second year typing students continued to average about 1.5 errors per minute for the clerk-typist and stenographer trainees. The same data seems to suggest that a more liberal standard of approximately 2 errors per minute is suitable for the general office clerk trainee.

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[1] Robinson, Jerry W., "Typing Accuracy: Myth or Mystery?" Delta Pi Epsilon Journal, Vol. XIV, No. 2, February, 1972, pp 13-27.

[2] Straight-Copy Typewriting Testing Program. San Mateo, California: San Mateo Union High School District, June, 1970.

It should be noted that the business firms and California counties contacted by the Task Force generally reported only that typists must "type accurately." Federal civil service standards, on the other hand, are quite specific and based upon the number of words typed; that is, the faster typist is permitted a greater number of errors than is the slower typist. These civil service standards are generally in conformance with the Robinson and San Mateo study results in the upper speed ranges but are tighter at the lower speeds. (At 50 to 55 gwpm a typist is allowed approximately 1.5 errors per minute; at 40 to 45 gwpm only about 1 error per minute is permitted.)

Replies to Task Force inquiries suggest that a minimum speed of 40 to 45 gwpm for clerk-typists and 50 to 55 gwpm for stenographers is expected by government and private employers in California. Most respondents did not indicate any typing requirement for general office clerks; those who did, indicated that the general office clerk requirement was the same as for the clerk-typist. Research studies indicate that a substantial number of students can develop typing speeds that meet business standards for clerk-typist and stenographer. Therefore, the recommended standards in the Task Force report have been set to conform to business needs for clerk-typists and stenographers. Because typewriting skill is not a major requirement of general office clerk positions and such related positions as file clerk and receptionist, the speed standard has been set much lower and more flexibly for them so as not to exclude students unnecessarily from training for those positions.

Straight copy timed writing accuracy is not a reliable predictor of performance on production activities. Poor straight copy typists are often good production typists. In any case, employers stress that, if anything must be sacrificed, speed must be sacrificed for accuracy of the final copy. Mailable or transmittable copy must be the goal--and students should know that is the ultimate goal from very early in the program.

West[3] suggests that where established standards exist they should be used as minimum school standards (i.e., straight copy, correspondence). Where standards do not exist (i.e., forms), relative standards should be used.

The standards suggested by this Task Force conform closely. Where speed standards could be reasonably determined, they were included. Accuracy standards appear in every appropriate objective and are relatively rigid to meet the demands of business.

A decision must be made regarding how much attention to give to skill building practice versus production activities.

West makes the following teaching recommendations:

1. Drastically reduce the amount of attention to ordinary stroking skills. Such skills contribute little to proper objectives of instruction (skill at realistic typing tasks) and do not suffer when the bulk of instruction is devoted to the typing tasks of real life.

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[3] West, Leonard J., Acquisition of Typewriting Skills. New York: Pitman Publishing Corporation, 1969.

2. Begin production typing training early (perhaps by about mid-October of first-year training). Devote first attention to the concepts and procedures that apply to placement of the typed product on the page: first, with much teacher guidance and assistance, but quickly thereafter substitute "confirmation" for "guidance." That is, provide much practice in making unassisted placement decisions, instantly followed by confirmation or correction of the student's decisions.

Where To From Here? We must recognize that research does not *yet* justify individual progress instruction. But the "logic" and fairness of giving each student the right materials *for him* and the right amount of time *for him* is inescapable. IPI can begin at the beginning; when it does, the need to have all students start the program at the same point in time disappears. If it seems impossible to build basic skills without group instruction of some kind, IPI can begin when the teacher decides it should--perhaps midway through the first semester or first year.

Achieving IPI in any school takes devotion to the task, time, and dollars. Careful study of new ideas, research, and materials should precede the move to IPI--but should *not* be used as an excuse for inaction. Action, if it comes, should be carefully planned, and revision should be expected as the program gets under way.

Finally, make decisions on the details of getting students to the point where they can meet the terminal performance objective standards. How much time for the keyboard? How much attention to speed? to accuracy? What should be evaluated as the student progresses toward those terminal goals? And how much attention does straight copy typing require or deserve?

There is much to be done! Are you ready for the challenge?

GLOSSARY

BECS	Business Education Consultant Service. A consultant service available to high school business departments through the Bureau of Business Education.
BEDDS	Business Education Data Dissemination System. Teacher prepared materials available on microfiche through the Bureau of Business Education.
CAPSTONE	An activity or program designed to refine or "put the finishing touches" on occupational skills before a student seeks full-time employment.
CERTIFICATION	To issue a certificate testifying as to the competencies of a student who has completed one of the occupational programs.
CHALLENGE	If a student feels that he can meet the objectives of a competency, he may ask to take a final test covering those objectives rather than working through the unit (i.e., challenge). If he successfully passes the test, he would receive credit for completing the unit.
CHECKER-CASHIER	Refers to the Checker-Cashier program as described in this GUIDE.
CLERK-TYPIST	Refers to the Clerk-Typist program as described in this GUIDE.
COMMON CORE	Competencies, or skills, which are common to both the distributive and office entry-level occupations.
COMPETENCY	Particular skills needed for entry-level employment.
CONDITION	The information and/or materials given to the student so that he may accomplish the objective.
CONTINUOUS PROGRESS	A system whereby the student may individually progress through a program until he chooses to stop. He is not restricted by artificial barriers such as staying with the class, or stopping because he has reached the end of the book or the "course."
CREDIT/NO CREDIT	Issued in lieu of grades. If a student completes a competency (i.e., meets the objectives) he receives credit; otherwise, he receives no credit until he can meet the objectives.
DE CORE	Competencies, or skills, common to entry-level employment in all of the distributive occupations.

GLOSSARY (continued)

DECA	Distributive Education Clubs of America.
ERIC	Educational Research Information Center.
DIAGNOSTIC	Tests used to determine the specific areas of student strength and weakness.
DOT	Dictionary of Occupational Titles.
DISTRIBUTIVE EDUCATION	The program of instruction which teaches marketing, merchandising, and management.
FBLA	Future Business Leaders of America.
GENERAL OFFICE CLERK	Refers to the General Office Clerk program as described in this GUIDE.
HOLOGRAPHIC WILL	A will written entirely by the originator in his own handwriting and signed by him without witnesses.
HRD	California State Department of Human Resources Development.
HumRRO	Human Resources Research Organization.
IMPLEMENTATION	The process and methods of moving into the new CBE program.
INDIVIDUALIZED INSTRUCTION	Instruction designed to allow the learner to progress at his own rate of speed through the use of LAP's, LAG's, multimedia materials, teacher aides, and tutors.
IPI	Individual Progress Instruction.
IN-SERVICE	The process of training teachers and other personnel in the use of new methods and/or materials while school is in session.
INSTRUCTIONAL AIDE	An aide who works in the classroom providing individual help to students.
INSTRUCTIONAL IDEAS	Methods which aid in the instruction of students.

GLOSSARY (continued)

INSTRUCTIONAL MATERIALS	Any item which aids in the instruction of students.
JOB SHEET	A step-by-step instruction sheet used by the student to work through a particular assignment.
LEARNING ACTIVITY GUIDE (LAG)	An individual unit of instruction which is usually correlated with, and is a guide through, other instructional materials such as textbooks, filmstrips, tapes, etc., and allows a student to progress at his own rate of speed.
LEARNING ACTIVITY PACKAGE (LAP)	An individual unit of instruction which may or may not be correlated with a textbook or other materials, which allows a student to progress at his own rate of speed.
LIVE OFFICE	An office occupations program simulating the operation of a real business in which a service and/or product are actually sold -- usually for in-kind of materials used.
MULTIMEDIA	All sources of media -- printed, visual, audio, etc. -- that can be used in an instructional program.
NO MARK (NM)	Issued in lieu of an "F" or "D" grade at grade report time to students who have not completed enough work to receive a grade. It is not recorded on the permanent record.
OFFICE CORE	Competencies, or skills, which are common to all entry-level office occupations.
OFFICE EDUCATION	Programs which are designed to train students for office occupations.
OPEN ENTRY/OPEN EXIT	Allowing a student to enter or leave the program at any time, not just at the quarter, semester, or beginning or end of the year.
PARA-PROFESSIONAL	An aide with skills in a particular area but who does not have a teaching credential.
PERFORMANCE OBJECTIVE	An objective for student achievement stated in terms of the performance and level of achievement expected.
PERFORMANCE	The activity the student will perform.
PHASE-IN	The steps that can be taken to implement the CBE program.

GLOSSARY (continued)

PHASE-OUT	The steps that can be taken for re-arranging the present program in a school to implement the CBE program.
POST-TEST	A test given after a student has worked through the competency to test his level of performance.
PRESCRIPTIVE PROGRAM	A program designed for a particular student after diagnosing his present strengths and weaknesses.
PRE-TEST	A test given before the student has worked through the unit to determine the extent of his present knowledge.
PROGRAM CONCEPT	The method of teaching distributive and office skills by occupational programs rather than by courses.
PROGRAM MANAGEMENT	The process of putting the program into operation and maintaining control over it.
SALESPERSON, GENERAL	Refers to the Salesperson program as described in this GUIDE.
SERVICE STATION ATTENDANT	Refers to the Service Station Attendant program as described in this GUIDE.
SIMULATED OFFICE	An office occupations program which simulates the operation of a real business office.
SPIN-OFF	Working on, and qualifying for, occupational programs closely related to those identified in this GUIDE.
STANDARD	The level of performance expected from the student.
STENOGRAPHER	Refers to the Stenographer program as described in this GUIDE.
STUDENT AIDE/TUTOR	Students who serve as clerical and teaching aides.
STUDENT STORE	A student operated store on campus used for training students in the distributive occupations.
TIME-LINE	A sequence of proposed events or activities in priority order.

TRADITIONAL PROGRAM	The program used in most schools in which a course consists of approximately thirty students meeting for one period per day, 5 days per week, for a semester or a year. The teacher attempts to progress through the course with all students working on the same material at the same time.
USOE	United States Office of Education.
VARIABLE CREDIT	(1) A system of granting credit where the amount of time spent on a unit of work may vary, or the amount of work completed in a certain period of time may vary. (2) A system of granting credit as soon as the work is completed instead of granting the credit at the end of the term.
WAITER-WAITRESS	Refers to the Waiter-Waitress program as described in this GUIDE.

CALIFORNIA STATE DEPARTMENT OF EDUCATION
BUREAU OF BUSINESS EDUCATION

# California Business Education Program Guide
for
Office and Distributive Occupations

Part II

First Draft - Prepared for 1973 Management Conferences
for Business Education Department Chairmen

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Part II

INTRODUCTION

Part II of the California Business Education Program Guide for Office and Distributive Occupations will contain suggested tests and instructional checklists which correspond to the competency modules in the Guide. Also included will be lists of instructional materials which may be considered for use with the Guide.

This edition of Part II, prepared for distribution at the 1973 Management Conferences for Business Education Department Chairmen, contains the tests and instructional checklists. Lists of materials will be added as they are available.

The pre/post tests were written to the performance objectives in the Guide. They are first-draft samples for tryout and review. They were designed to be given at the beginning of the competency modules to alert the student to his strengths and weaknesses and/or at the end of the competency modules to determine whether or not the student has reached the level of performance required for entry-level employment. Teachers may prefer preparing their own tests for the modules. No tests were included for the Working with People Competencies (115 and 207) at this time. The tests are identified by the competency number followed by the number indicating that the tests may be utilized as both pretests and posttests; e.g., 101.03/101.04.

Instructional checklists are included for several of the competencies. They were adapted from a study conducted for the Bureau of Business Education by the Human Resources Research Organization (HumRRO) entitled "Development and Pilot Test of a Career-Oriented, Peer-Instructional Model in the Office Cluster of Business Occupations." These checklists were included for use as instructional activity guidelines and to validate completeness of performance testing.

Lists of materials from several sources are being developed. These lists will contain items considered appropriate for the competencies included in the Guide.

Publishers were invited to submit lists of materials appropriate for the competencies included in the Guide and to demonstrate them at the Management Conferences. Several publishers accepted the invitation and their lists will be distributed at the Conferences.

Other materials for use in the instructional program will be identified in the catalog of the Business Education Data Dissemination System (BEDDS).

Another list of materials to be available in the future, will contain elusive-type materials that have been noted by the Task Force members who prepared the Guide.

Teachers will want to keep in mind that the materials selected should be appropriate to the student's level of learning and should provide alternative approaches.

Note to Teacher:

You may use the 32 suggested adding machine problems or make your own.

Materials Needed:

Answer sheet.

5.36
.15
7.18
22.37
2.99
.66
.25
1.64
163.99
____ (1)

.50
.32
8.80
.11
12.10
125.10
36.21
5.20
3.63
61.88
____ (2)

726.17
5.34
7.85
.08
4.48
91.79
652.37
.67
43.18
____ (3)

7.28
2.08
24.94
9.11
.55
382.56
.93
5.54
.03
353.70
____ (4)

6.42
.02
.66
578.78-
25.15
1.56
32.50-
600.00
25.15
____ (5)

2.64
164.47
.21
12.11-
.71
4.83-
785.16
333.31-
____ (6)

467.79
42.89-
____ (7)

7.94
4.75-
____ (8)

134.55
4.78-
____ (9)

1.07
x.94
____ (10)

257 x 213 = ____ (11)

157 x 861 = ____ (12)

1,375
x 57
____ (13)

1,246
x 575
____ (14)

27.831
x .12
____ (15)

4.11
.55
4.07
671.93
7.78
.08
____ ST (16)
1.69
1.69
2.41
.15
____ GT (17)

2.01
5.76
3.36
____ ST (18)
20.80
97.50
.89
6.13
____ ST (19)
.75
.01
____ GT (20)

.06
.06
.06
.91
.91
88.38
88.38
88.38
88.38
4.10
4.10
____ (21)

257
257
41
41
44
44
44
120
120
120
120
131
____ (22)

537
15
718
227
25
164
____ (23)

94.24
2.80
.97
8.71
72.45
____ (24)

620
71
79
362
72
699
____ (25)

.10
5.47-
9.12
7.50-
.74
____ (26)

6.13
6.63
.31
36.39-
36.39
____ (27)

85.50
-9.94
____ (28)

9.25
-8.7
____ (29)

7,624
x1,003
____ (30)

3,753
x 61
____ (31)

4.11
.55
4.07
671.93
7.78
.08
____ (32)

Note: Teachers may wish to reproduce part of these materials in handwriting.

Note to teacher:

You will need punched cards and the information on the fields on those cards. Also a computer printout and the source document (such as a time card) from which the printout was made.

Materials needed:

1. Test sheet(s)
2. Pre-punched cards and field information
3. Source document (such as a time card) and computer printout

Instructions: Match these data processing terms with their definitions:

1. CPU
2. computer
3. computer printout
4. EDP
5. GIGO
6. hardware
7. input
8. output
9. magnetic tape
10. mark-sense card
11. OCR
12. off-line
13. on-line
14. paper tape, punched
15. program
16. pegboard
17. punched card
18. source document
19. storage
20. terminal
21. time-sharing
22. business data processing

_____Optical character reader
_____output from a computer
_____a card which can be read by a scanning machine
_____when two or more companies share the time of one computer
_____information stored in a computer for future use
_____a list of instructions to a computer telling it to process, or arrante, data
_____a tape in which holes have been punched to record information
_____business paper used to record data for the first time (sales slips, invoices, time cards, checks, etc.)
_____electronic data processing
_____when information from a source document is put into a form that can be processed easily
_____arranging words, numbers, and symbols about business transactions to provide useful information
_____garbage in, garbage out principle
_____a location where input can be relayed to and output received from a central processing unit
_____a simple data processing system
_____non-integrated data processing
_____central processing unit
_____a tape on which information is recorded magnetically so it can be processed on electronic equipment
_____when data recorded by one machine is transmitted and processed by other machines
_____a card in which holes have been punched to record information
_____when information that has been processed is organized and arranged in a usable form (a monthly bill, an invoice, a report)
_____the latest tool to aid in the processing of data
_____equipment used in a data processing system

You will be given a prepunched card and information on the fields used on it. Write the information given on the card.

You will be given a computer printout sheet and a source document for that sheet. Please describe briefly, in writing, how the source document was used in the preparation of the printout sheet.

Note to teacher:

The time lapse between pre and post-test to be determined by student and teacher. This will vary according to the amount of time needed to obtain results in the areas needing improvement. You should notify students prior to the time of this test what is expected of them.

Pictures must be taken and developed before the pre-test and post-test can be completed.

Be certain you retain pictures from the pre-test for use in the post-test.

Materials needed:

1. Grooming Checklist
2. Camera
3. Tape or film

Checklist	Pass	Improve
1. HAIR		
a. Neat		
b. Healthy looking		
c. Style complimentary to face shape and features		
d. Length appropriate for job situation		
2. FACE		
a. Complexion clear		
b. Clean appearance		
c. Make-up appropriate for daytime working		
d. Make-up complimentary to face shape and features		
e. Beards, sideburns, moustache clean, neat and appropriate to job situation		
3. BODY*		
a. Pleasant body odor		
b. Clean appearance		
c. Erect posture - standing		
(1) head up		
(2) shoulders straight, back relaxed		
(3) stomach in		
(4) buttocks tucked in		
d. Erect posture - sitting		
(1) feet on floor		
(2) back straight		
(3) arms relaxed		
(4) buttocks to the back of chair		
4. WEIGHT		
a. Appropriate for body structure		
5. CLOTHING		
a. Clean and neat		
b. Well fitting		
c. Appropriate for body structure		
d. Appropriate for job situation		
e. Color and design coordinated		
f. Accessories appropriate for job situation		

*Observation rather than picture.

Instructions: Today you have come to class dressed as you would appear for an interview. During the day you will be photographed or videotaped using front, back and/or side views. These pictures will be used later during the unit on Grooming for comparison purposes and to develop a personalized program of improvement in the following areas:

a. Hair style and grooming
b. Complexion care and make-up
c. Posture
c. Weight control
e. Clothing style and lines

Check those units you feel need the most improvement.

Instructions: Today you have come to class dressed as you would appear for an interview. During the day you will be photographed or videotaped using front, back and/or side views.

Obtain the pictures taken on the pre-test and those taken now. Compare these two sets listing noticeable improvements in the following areas:

a. Hair style and grooming
b. Complexion care and make-up
c. Posture
d. Weight control
e. Clothing style and lines

Note to teacher:

Test question No. 2 suggests the instructor dictate the following material on a tape to be used by the student. Pause between each item to allow the student time to write. Spell any words you feel are difficult.

Suggested script for tape:

"Please order the following items from Smith, Jones and Smith, 1960 Allen Street, Santa Barbara, California 93901. I want six reams of white bond paper at the cost of $1.25 a ream. I will also need two electric typewriter ribbons at $2.50 each. The subtotal will be $12.50 plus 63¢ tax, or $13.13 for a grand total."

Materials needed:

1. Sheet(s) of paper
2. Prepared tape
3. Playback unit
4. Four (4) purchase requisitions
5. one (1) carbon sheet
6. Job application blank(s)

1. Holographic (handwritten) wills are legal in California. You will be given three minutes to copy the will printed below in your own handwriting. Your copy will be judged for legibility based on the absence of the following factors:

   a. uneven alignment
   b. crowded letters/words
   c. light/heavy pen lines
   d. improper formation of letters
   e. irregular slant
   f. space between letters/words exceeding 1/8 inch

I, Richard Terzich, being of sound mind and good judgment, hereby make my last will. I give all my property, both real and personal, to my wife, Raquel Terzich. I appoint my wife executrix of this will, without bond. I give her power to sell all or any of my estate without an order of court. I revoke all wills by me heretofore made.

Richard Terzich

2. You will need four purchase requisitions and a carbon sheet for this test. See the teacher or teacher aide for materials and tape.

   You will listen to the tape, printing the message once and writing the message once, making a carbon copy each time. You will be judged on the legibility of the carbon copies as well as the originals.

PURCHASE REQUISITION

No.________________

To:________________________

____

____

From: GEM
P.O. Box 521
Fillmore, CA 93015

No.	Unit	Item	Unit Cost	Cost	OK
		Subtotal			
		Tax			
		TOTAL			

Instructions: Complete the following application blank exactly as you would if you were preparing it for a prospective employer. If three people consider it legible, then your application is acceptable.

BLACK MANUFACTURING COMPANY
1601 North Towne Avenue
Canyon Country, CA 91351

Application for Employment

PLEASE PRINT

Name____ Date__________________, 19___
(Last) (First) (Middle)

Home Address____
(No. and Street) (City) (State) (Zip)

Phone No.____________________ Social Security Acct. No.____________________

Job Applied for____

Age__________ Height______________ Weight__________ Sex______________ Married______________

No. of Dependents__________ Relationship____________________ Date of Birth____________________
(Mo.) (Day) (Year)

Place of Birth____________________________________

Name of Person to be Notified in Case of Emergency______________________________

Relationship__________________ Address__________________________ Phone______________

- -

PLEASE WRITE

EDUCATION

High School Attended____
(Name) (Address) (City) (State)

Did you graduate?__________ Education Beyond High School____________________

BUSINESS SKILLS

Shorthand?__________ Speed__________ Typing?__________ Speed__________ Other__________

Note to teacher:

1. Instruct the students to read the Guide for Preparing a Return prior to answering the true and false statements.
2. The instructor dictates the material on a cassette tape to be used by the student.*
3. The instructor dictates the material on a tape to be used by the student. Students should be informed as to the location of the W-4 Form.
4. The instructions are so written that the teacher might give only the pictures, only the written instructions, or give both at her discretion.

Materials needed:

1. Test(s) and answer sheet(s)
2. True and False Test plus Guide for Preparing a Return
3. Taped test, playback unit, and answer sheet for 10 questions
4. Test sheet with a sheet of lined paper
5. Taped test, playback unit, and instruction sheet and a W-4 Form
6. Instruction sheet and two letters and a large and small envelope

* Suggested script on page 23.

Instructions: List what element or elements are missing from the following instructions (do not write on this paper - use the answer sheet provided):

1. Get the typewriter and bring it to my desk.
2. Today, January 10, make a check payable to Jones and Smith for Invoice #694.
3. Bring me change for a dollar.
4. Here is 50¢. Buy me two candy bars.
5. Write your name on the paper and hand to your teacher.
6. Paint the room.
7. We're having company. Please set the table.
8. We are out of the filing test. Put the pages together and staple. Duplicate some more.
9. Type the tests.
10. Phone to let them know I cannot attend the meeting.

Instructions: After reading the Guide for Preparing a Return on the following page, answer true (T) or false (F) to each statement having to do with preparing an income tax return. Do not write on this sheet - use the answer sheet provided.

_____ 1. An employer is the only individual who can issue a W-2 Form.
_____ 2. An individual should use his name and address on the mailing label sent with his income tax form.
_____ 3. Occupations are listed in the upper left corner below the social security number.
_____ 4. When you have completed lines 11 through 17 you will have your adjusted gross income.
_____ 5. An individual has a right to decide whether to use the standard deduction or itemize deductions.
_____ 6. The total deductions on Schedule A are entered on line 54 of Form 1040.
_____ 7. If the government owes you a refund, the amount is shown on line 29.
_____ 8. W-2 Form (copy B) must be attached to the front of Form 1040.
_____ 9. If line 17 is under $10,000, you find your tax in tax tables 1 through 12.
_____10. It is recommended you check your arithmetic.

Guide for Preparing a Return

You may find it helpful in completing your Form 1040 to follow these steps and check them off as you go.

Gather up your income records including Forms W-2, W-2P, and 1099. If your employer does not give you a Form W-2 by January 31, or if the one you have is not correct, contact your employer as soon as possible. Only he can issue your W-2 or correct it.

Name and Address. Use the mailing label on the forms we sent you. Correct your name and address if necessary. Also show your apartment number if you have one. If you did not receive forms with a label, print or type your name and address. If you are in the Armed Forces, use your permanent home address.

Social Security Number. If it is wrong on the label or if you did not receive a label, show your correct number on your return. If you are in the Armed Forces, also give your serial number if different from your social security number.

Don't forget to show occupation(s) in space(s) in upper right corner just below social security blocks.

Fill in lines 11 through 17. This will give you your adjusted gross income. The instructions between lines 17 and 18 are guides to tell you where to proceed after you have filled in line 17. If the first instruction is applicable, be sure to check the block.

Now you have to decide whether to use the standard deduction or itemize your deductions. The instruction, Should You Use the Standard Deduction or Should You Itemize Deductions?, on page 6 will help you decide.

If line 17 is under $10,000, find your tax in Tax Tables 1 through 12. (The standard deduction is included and your tax is already figured out for you.) Enter the amount on line 18. Skip the rest of this step and step 12.

If line 17 is $10,000 or more, fill in lines 51 through 55 on the back of your return. (Your standard deduction goes on line 52.) Use Tax Rate Schedule X, Y, or Z to figure your tax. Show the amount on line 18.

If we owe you a refund, show amount on line 29. On line 30 or 31, show whether you want some or all of the money refunded or credited to 1973 estimated tax. If line 29 is less than $1, we will send you a refund only upon written request.

Recheck your return. Go over all items and make sure they are right. Also check your arithmetic.

Guide for Preparing a Return (continued)

Attachments. Attach Forms W-2 (copy B) to front of Form 1040. If you took an adjustment for sick pay on line 46, be sure to attach Form 2440 or if you are retired because of a disability, your Form W-2P (copy B). Attach schedules in alphabetical order and forms in numbered order. If you owe tax, be sure to attach your payment to the front of Form 1040.

Instructions: For this portion of the test, obtain the prepared tape (Instructions Test - Math Listings) from your teacher. You will be given a list of addition and subtraction problems. Please record the proper numbers and signs with totals on the answer sheet provided.

Suggested script for the prepared tape:

1. Please add two dollars and fifty-nine cents, eighty-six cents, three dollars and eighty-four cents; total.
2. Please add twelve dollars and seventy-six cents, nine dollars and eighty-seven cents with these being totalled.
3. Please add two-thousand four-hundred dollars, three-thousand seven-hundred-fifty dollars, and four-thousand two-hundred and fifty dollars. Total please.
4. Please add three-hundred-fifty dollars and nine-hundred-sixty dollars.
5. Please total one-hundred-five dollars and sixty cents and thirteen dollars and twenty cents.
6. Subtract ninety-two dollars and 80 cents from one-hundred forty-four dollars.
7. Find the total when subtracting one-hundred twenty dollars from seven-hundred fifty dollars.
8. Subtract seven-hundred ninety-four from nine-hundred ninety-three.
9. Take five-hundred ninety-two from nine-hundred and seven.
10. Subtract twenty-five from seven-hundred eighty-six.

Instructions: Now that you have completed some drills on reading instructions and on proofreading, it is time to take a short test. It must be redone until there are no major deficiencies. Follow instructions EXACTLY. This test is to be completed on a sheet of lined paper in your own handwriting.

1. Sign your full name in the upper-right-hand corner.
2. Write the name of your school on the first line of the paper - at center point.
3. Write today's date on the last line of the paper - at center point.
4. Add the following numbers and put the total on the 10th line of the paper - as close to the left edge as possible. 15 and 29 and 33 and 800.
5. Place a circle around your name.
6. Draw a triangle around the date.
7. Put a circle around the answer to No. 4.
8. Write the proofreader's symbol for "insert" at the center of the page on line 15.
9. On line 13 write the following: It is of vital importance that instructions be read carefully. (Use part of line 14 if necessary.)
10. Print your full name on the eighteenth line of the paper, ending it as close to the right edge of the paper as possible.

11. Proofread the following sentence and write the correct spelling of the misspelled words on line 5 of your paper.

    Insurance companys allways seem to come out ahead even tho they do have to pay a lot of settllements.

12. Circle each word on your answer sheet from No. 11 above.

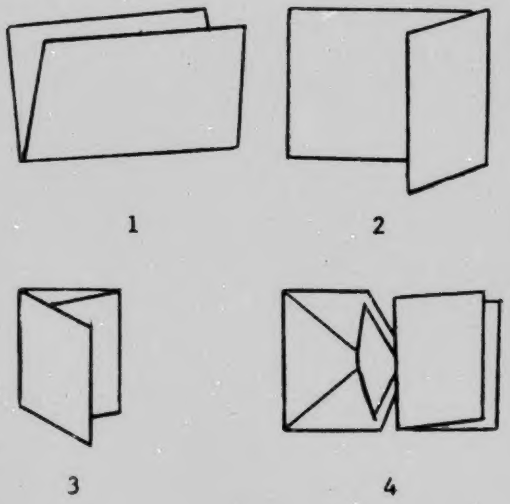
Instructions: For this portion of the test you will need to complete the instructions that follow.

Secure an Employee's Withholding Exemption Certificate (Form W-4) from your teacher. Complete the form as though you were married with one additional exemption. Follow the instructions given on the form. When you have finished this form, staple it in order with the other test papers.

Instructions: Given written instructions on how to fold a letter for a large envelope and for a small envelope, you will read the instructions and then ORALLY instruct three of your classmates so they may complete the activity correctly.

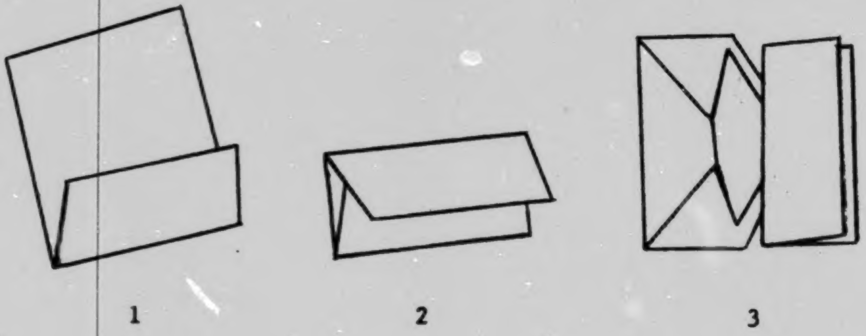
HOW TO FOLD LETTERS

FOLDING FOR A SMALL ENVELOPE



1. Fold the bottom edge of the sheet of ½ inch from the top.
2. Fold right-hand third toward left.
3. Fold left-hand third toward right to within ¼ inch of edge.
4. Insert into envelope - last crease first.

FOLDING FOR A LARGE ENVELOPE



1. Fold the bottom third of the paper toward the top.
2. Fold the top third over the bottom third to within ¼ inch of bottom fold.
3. Insert in envelope - last crease first.

Note to Teacher:

1. If the student has not previously dressed appropriately for an interview for an office job, he should be requested to do so when he takes this test and you should discuss this with him.

2. Equipment needed:
    Stop watch or clock with second hand
    Cassette recorder-playback

Materials Needed:

1. Forms needed:
    Application blank
    Social Security Application Form
    W-4 Form
    Resume (sample)

1. Here are 25 words or phrases commonly used on employment forms. Match them with their definitions:

1. applicant
2. qualifications
3. work history
4. background
5. upgrading
6. verification
7. marital status
8. dependent
9. bonded
10. misdemeanor
11. summary offense
12. bona fide
13. full-time
14. part-time
15. work limitations
16. starting salary
17. cause for dismissal
18. character reference
19. Workman's Compensation
20. physical impairment
21. surety bond
22. spouse
23. bilingual
24. security clearance
25. naturalized citizen

1. Definitions:

_____ a crime less serious than a felony
_____ the pay given to a person beginning a job
_____ the amount of time considered normal or standard for working during a given period
_____ an endorsement that fits a person (as for an office)
_____ able to use two languages fluently
_____ authorization to work with items that must be guarded against espionage or sabotage
_____ advancing to a job requiring a higher level of skill
_____ a minor infraction of law speedily disposed of without usual legal formalities (traffic ticket, etc.)
_____ insurance against statutory damages arising from injury to employees while in the employment of an insured employer
_____ inability to pursue an occupation because of body damage (bodily disability)
_____ relying on another for support
_____ the act of establishing truth and accuracy
_____ a bond guaranteeing performance of a contract or obligation
_____ performance made binding by a money forfeit
_____ one admitted by law to the rights of natives
_____ one to whom inquiries can be made about the personal qualifications of a person seeking a job
_____ made in good faith without fraud or deceit; sincere
_____ one who applies
_____ the total of a person's experience, knowledge, and education
_____ less than the amount of time considered normal or standard for working during a given period
_____ reason for losing a job
_____ relating to the married state
_____ something that reduces or restricts amount or quality of labor a person can do
_____ a chronological record of a person's labor for pay
_____ husband or wife

2. On the Social Security Application Form and W-4 Form (Employee's Withholding Exemption), supply the required information.

3. Briefly define:
    gross pay
    net pay
    Federal withholding tax
    State withholding tax
    FICA
    SDI

4. List at least three "other deductions" that an employee might authorize to be withheld from a payroll check.

5. On the check furnished, write a "blank endorsement."

    On the check, write a "restrictive endorsement."

6. Employment Testing. This is a 2-minute test.

    Circle the correct answer:

    1. The fifth month of the year is:
    January May June July

    Underline the correct answer:

    2. Too much sun can cause a sunburn.
    TRUE FALSE

    Put the correct answer in the brackets:

    3. The sum of 20 and 50 is
    (   )

6. (continued)

Block the section with the correct answer:

4. How many months are there in a year?
   a. 12 b. 13 c. 11 a. b. c.

Put a square around the correct answer:

5. The first month of the year is:
   December February January March

Mark the letter "T" if the statement is True or "F" if the statement is False.

6. Testing is easy. ________

7. This 2-minute timed test uses directions often used in employment testing. Your teacher will time you while you try for 100% accuracy.

Circle the correct answer:

1. The seventh month of the year is:
   June July August September

Underline the correct answer:

2. After an interview, it would be pushy for an applicant to write a follow-up letter to a prospective employer.
   TRUE FALSE

Put the correct answer in the parentheses:

3. The sum of 19 and 31 is
   ( )

Circle the correct answer:

4. How many weeks are there in a year?
   a. 48 b. 51 c. 52

7. (continued)

Put a square around the correct answer:

5. What is the boiling point of water at sea?

   32^{o} 92^{o} 212^{o}

Write the letter "T" if the statement is True or "F" if the statement is False:

6. After an interview, it is courteous for the applicant to write a follow-up letter to the prospective employer.

   ____

8. Complete the four major areas covered on a job resume or data sheet (attached). A rough draft is acceptable if one has not already been developed; otherwise, submit the finished draft.

9. Complete the attached application blank. If you have a data sheet, you may use it for reference.

10. List 4 questions an employment interviewer might ask an applicant.
    1.
    2.
    3.
    4.

11. Plan your telephone conversation, then record on a cassette tape your side of the conversation as you make an appointment for an interview. Play it back with the teacher and discuss it.

12. From a list of individual strengths and weaknesses (from an employer's point of view), select two of each that you feel might be yours.

Strengths	Weaknesses

Is there any way you could present one of your weaknesses so it would actually be a strength?
(example: young--but adaptable!)

EMPLOYMENT APPLICATION

To Applicant: We deeply appreciate your interest in our organization and assure you that we are sincerely interested in your qualifications. A clear understanding of your background and work history will aid us in placing you in the position that best meets your qualifications and may assist us in possible future upgrading.

(PLEASE PRINT PLAINLY)
ON THE FIRST FOUR LINES

PERSONAL

Date: ______

Name ______ (Last) ______ (First Initial) ______ (Middle Initial) Social Security No. ______

Present address ______ (No. Street City State Zip) Telephone No. ______

How long have you lived at above address? ______

Previous address ______ (No. Street City State Zip) How long did you live there? ______

To Applicant: READ THIS INTRODUCTION CAREFULLY BEFORE ANSWERING ANY QUESTIONS IN THIS BLOCKED-OFF AREA. The Civil Rights Act of 1964 prohibits discrimination in employment practice because of race, color, religion, sex or national origin. P.L. 90-202 prohibits discrimination on the basis of age with respect to individuals who are at least 40 but less than 65 years of age. The laws of some States also prohibit some or all of the above types of discrimination.

DO NOT ANSWER ANY QUESTION CONTAINED IN THIS BLOCKED-OFF AREA UNLESS THE EMPLOYER HAS CHECKED THE BOX NEXT TO THE QUESTION, thereby indicating that the requested information is needed for a bona fide occupational qualification, national security laws, or other legally permissible reasons.

☐ Are you over the age of twenty-one? ______ If no, hire is subject to verification that you are of minimum legal age.

☐ Sex: M ______ F ______ ☐ Height: ______ ft. ______ in. ☐ Weight: ______ lbs.

☐ Marital Status: Single ______ Engaged ______ Married ______ Separated ______ Divorced ______ Widowed ______

☐ Date of Marriage ______ ☐ Number of dependents including yourself ______ ☐ Are you a citizen of the U.S.A.? ______

☐ What is your present Selective Service classification? ______

☐ Indicate dates you attended school:

Elementary ______ (From To) High School ______ (From To) College ______ (From To)

Other (Specify type of school) ______ (From To)

☐ Have you ever been bonded? ______ If yes, on what jobs? ______

☐ Have you been convicted of a crime in the past ten years, excluding misdemeanors and summary offenses? ______ if yes, describe in full ______

Employer may list other bona fide occupational questions on line below:

☐ ______

What method of transportation will you use to get to work? ______

Position(s) applied for ______ Rate of pay expected $______ per week

Would you work Full-Time ______ Part-Time ______ Specify days and hours if part-time ______

Were you previously employed by us? ______ If yes, when? ______

List any friends or relatives working for us ______ (Name(s))

If your application is considered favorably, on what date will you be available for work? ______ 19______

Are there any other experiences, skills, or qualifications which you feel would especially fit you for work with the Company? ______

______

______

Do you have any physical defects which preclude you from performing certain kinds of work? ______ If yes, describe such defects and specific work limitations. ______

______

Have you had a major illness in the past 5 years? ______ If yes, describe ______

______

Have you received compensation for injuries? ______ If yes, describe ______

______

(Turn to Next Page)

RECORD OF EDUCATION

School	Name and Address of School	Course of Study	Check Last Year Completed				Did You Graduate?	List Diploma or Degree
Elementary			5	6	7	8	☐ Yes ☐ No	
High			1	2	3	4	☐ Yes ☐ No	
Other (Specify)			1	2	3	4	☐ Yes ☐ No	

PERSONAL REFERENCES (Not Former Employers or Relatives)

Name and Occupation	Address	Phone Number

List below all present and past employment, beginning with your most recent

Name and Address of Company and Type of Business	From		To		Describe in detail the work you did	Weekly Starting Salary	Weekly Last Salary	Reason for Leaving	Name of Supervisor
	Mo.	Yr.	Mo.	Yr.					

May we contact the employers listed above? ________ If not, indicate by No. which one(s) you do not wish us to contact ________

____

____
Signature of Applicant

Note to Teacher: None

Materials Needed:

1. Change
2. Cash box
3. Cash report form
4. Items to purchase
5. Sales book (cash receipt book) or cash register (if possible)

1. Given a change fund, a cash box, a cash report form, you will count the cash by denomination and complete a cash report form as shown below:

CASH REPORT FORM

	Number	Amount
Pennies		
Nickels		
Dimes		
Quarters		
Half Dollars		
Silver Dollars		
Paper Money		
Checks		
Total		

2. One student will purchase items from another student for cash using a till. The student will complete the transaction on a cash register, if available, and give change. If cash register is not used, write out a receipt.

3. You are to complete a cash report form for the following transactions for the day:

Received the following cash through sales:

$15.31
3.00
5.29
.16
13.95
1.19
.79
6.29
.29
.89
Total Sales

The cash register readings at the beginning of the day was $00.00. There was $50.00 in change and bills placed in the cash drawer at the start of the day. The cash register reading at the end of the day was $97.17. Prepare a daily cash report.

3. (continued)

HANSON'S STORE

CASH REGISTER REPORT

MONEY IN DRAWER	AMOUNT	
Pennies		
Nickels		
Dimes		
Quarters		
Half Dollars		
Silver Dollars		
Paper Money		
Checks		
TOTAL 1. CASH IN DRAWER		
ADD TOTAL PAID OUT SLIPS		
TOTAL 2. TOTAL CASH RECEIVED		
REGISTER READINGS*		
*TOTAL 3. GROUP TOTAL (total Cash)		
*TOTAL 4. RECEIVED ON ACCOUNT		
TOTAL 5. CASH SALES (Total 3 minus Total 4)		
*TOTAL 6. CHARGE SALES		
TOTAL 7. TOTAL SALES (Total 5 plus Total 6)		
*TOTAL 8. PAID OUTS		
DEPARTMENT READINGS		
*DEPT I. GROCERIES		
*DEPT II. MEATS		
*DEPTIII. PRODUCE		
TOTAL SALES		
COMPUTATION OF CASH SHORT OR OVER		
TOTAL 3		
TOTAL 2		
CASH SHORT OR OVER		

Signed ______________________ Date ______________

*These figures obtained from detailed audit slips.

Note to teacher:

Individual sections may be used during the learning process for testing purposes or a sampling from each section may be combined to develop the final test.

Materials needed:

1. through 10. No special materials needed other than answer sheet(s).
11. Decimal conversion table and answer sheet(s).
12. Vary the number of articles - there should be a minimum of 10; a maximum of 100.
    a. box of pencils
    b. container of paper clips
    c. envelope of checks
    d. mailing list with last names beginning with most of the letters of the alphabet, some repeats, including several R's
    e. stock control sheet with several items checked for re-order, from the grocery store
    f. cut-out pieces of construction paper or blocks of wood to include:
        (1) red squares
        (2) red circles
        (3) blue squares
    g. stack of envelopes
13. a. Federal Income Tax chart for weekly deductions
    b. California Sales Tax chart
    c. Postage chart including zone definition
    d. Answer sheet(s)

14 and 15. Answer sheet(s)

16. a. Measuring tape
    b. Yardstick
    c. File box
    d. Piece of string
    e. Piece of yardage

Materials needed (continued):

17. a. Postage scale
    b. Arrange for students to weigh a person designated by you. Suggest you use the scale in the nurse's office or bring a bathroom scale to your room.
    c. If possible, borrow a gram scale from the science or home economic department
    d. Letter in envelope ready for mailing
    e. A package ready for mailing
    f. A ream of paper
    g. A head of cabbage
    h. A small sack of candy
    i. An over-sized (9" x 12") envelope filled with paper
    j. A teaspoon of salt in a plastic bag
    k. A small package of coffee beans
    l. A roll of nickels
    m. Answer sheet(s)

1. Add the following:

a. 633
842
21
1,790
500
50

b. 16,487
743
491
67,308
69

c. 27
55,000
628
317
107
55

d. 79,595
484
5,812
94

e. 20,385
46,127
99
363

f. 12
984
6,354
15
242

g. 118
300
92
312
6,846

h. 1,242
214
39
8,111
156

i. 50,000
758
1,589
89
6,017

j. 4,900
99
183
10
9,587

2. Subtract to determine the answers to the following problems:

a. 4109
-2498

b. 6998
-6317

c. 5159
-854

d. 6000
-4838

e. 63197
-2498

f. 2498
-1389

g. 8687
-2349

h. 7384
-6246

i. 10603
-3967

j. 15408
-1563

3. Multiply and record answers for the following:

a. $\begin{array}{r} 766 \\ \underline{\times 29} \end{array}$

b. $\begin{array}{r} 215 \\ \underline{\times 3} \end{array}$

c. $\begin{array}{r} 380 \\ \underline{\times 24} \end{array}$

d. $\begin{array}{r} 29 \\ \underline{\times 13} \end{array}$

e. $\begin{array}{r} 591 \\ \underline{\times 378} \end{array}$

f. $\begin{array}{r} 186 \\ \underline{\times 56} \end{array}$

g. $\begin{array}{r} 525 \\ \underline{\times 250} \end{array}$

h. $\begin{array}{r} 393 \\ \underline{\times 45} \end{array}$

i. $\begin{array}{r} 500 \\ \underline{\times 20} \end{array}$

j. $\begin{array}{r} 37 \\ \underline{\times 27} \end{array}$

4. Divide and record quotients. Ignore remainders when recording answers.

a. $58/\overline{180}$

b. $63/\overline{20,348}$

c. $65/\overline{4023}$

d. $46/\overline{94,851}$

e. $21/\overline{42,350}$

f. $52/\overline{66,589}$

g. $33/\overline{20,284}$

h. $87/\overline{18,813}$

i. $83/\overline{648}$

j. $85/\overline{31,212}$

5. Compute answers to the following problems. Ignore remainders when recording answers to division problems.

a. $\begin{array}{r} 4.50 \\ 1.23 \\ .56 \\ \underline{.49} \end{array}$

b. $\begin{array}{r} 1.62 \\ 5.431 \\ 6.29 \\ \underline{12.00} \end{array}$

c. $\begin{array}{r} 10,000.00 \\ 14.63 \\ 9.02 \\ 4.551 \\ \underline{1.201} \end{array}$

d. $\begin{array}{r} 1.492 \\ 20.100 \\ 6.013 \\ \underline{5.00} \end{array}$

e. $\begin{array}{r} 1.45 \\ 6.12 \\ 10.50 \\ \underline{5.20} \end{array}$

f. $\begin{array}{r} 20.00 \\ \underline{-1.98} \end{array}$

g. $\begin{array}{r} 100.00 \\ \underline{-15.00} \end{array}$

h. $\begin{array}{r} 12.42 \\ \underline{-1.63} \end{array}$

i. $\begin{array}{r} 15.00 \\ \underline{-4.98} \end{array}$

j. $\begin{array}{r} 91.00 \\ \underline{-19.00} \end{array}$

k. $\begin{array}{r} 45 \\ \underline{x.035} \end{array}$

l. $\begin{array}{r} 1.88 \\ \underline{x100} \end{array}$

m. $\begin{array}{r} .1 \\ \underline{x.54} \end{array}$

n. $\begin{array}{r} 58.74 \\ \underline{x2} \end{array}$

o. $\begin{array}{r} 2.82 \\ \underline{x.01} \end{array}$

p. $42/\overline{8.27}$

q. $18/\overline{13.68}$

r. $5.8/\overline{3.53}$

s. $006./\overline{12.07}$

t. $.55/\overline{327}$

6. Convert common fractions to decimals, round off to two places.

a. 1/2

b. 3/4

c. 2/3

d. 1/4

e. 2/5

f. 6/10

g. 3/5

h. 2/8

i. 1/6

j. 3/9

7. Reduce the following fractions to lowest terms:

a. 8/10
b. 6/8
c. 5/15
d. 10/12
e. 16/48
f. 4/8
g. 3/9
h. 16/24
i. 25/50
j. 8/32

8. Add the following fractions:

a. 2/10 + 1/2 + 3/10 + 6/10 =
b. 3/4 + 1/2 + 6/8 =
c. 2/3 + 1/3 + 2/3 =
d. 3/4 + 1/5 + 1/2 =
e. 1/5 + 2/10 + 6/10 + 3/5 =

Subtract the following fractions. Reduce answer to lowest term.

a. 3/4 - 1/3 =
b. 8/10 - 4/10 =
c. 4/5 - 5/10 =
d. 4/8 - 1/4 =
e. 1/2 - 3/10 =

Multiply the following fractions. Reduce answer to lowest term.

a. 2/10 x 1/5 =
b. 6/8 x 3/4 =
c. 1/2 x 2/4 =
d. 4/8 x 3/4 =
e. 2/3 x 1/5 =

8. (continued)

Divide the following fractions. Reduce answer to lowest term.

a. 1/4 ÷ 1/2 =
b. 3/4 ÷ 3/5 =
c. 6/10 ÷ 3/5 =
d. 1/10 ÷ 2/10 =

e. 6/8 ÷ 1/5 =

9. Compute answers to the following problems:

a. 4.50
1.23
.56
.49

b. 3½ x 4.60 =

c. 9 - 2/3 =

d. 13.68 ÷ 1.3 =

e. 3 2/3 + 6 2/3 =

f. 12.42
-1.63

g. 45 x .035 =

h. 2½ + 3 + 4.5 + 6 3/4 =

i. 1.62
5.431
6.29
12.00

j. 3/4 ÷ 1/2 =

10. Round off the following numbers to 3 decimal places:

a. 9.1043 b. 10.26501 c. 216.9542

Round off the following numbers to 2 decimal places:

a. 100.495 b. 1.7801 c. 20.013

Round off the following numbers to 1 decimal place:

a. 10.004 b. 1.359 c. 4.551 d. 3.761

11. Convert the following fractions to decimal equivalents and the decimal fraction to fraction equivalents. Use the attached conversion table.

a. 5/6 b. 7/12 c. .8571 d. 11/16 e. 5/12

f. .4375 g. 15/16 h. 4/5 i. 2/3 j. .1667

Decimal Equivalents for Fractions

	3rds	4ths	5ths	6ths	7ths	8ths	12ths	16ths
1.	.3333	.25	.2	.1667	1429	.125	.0833	.0625
2.	.6667	.5	.4	.3333	.2857	.25	.1667	.125
3.		.75	.6	.5	.4286	.375	.25	.1875
4.			.8	.6667	.5714	.5	.3333	.25
5.				.8333	.7143	.625	.4167	.3125
6.					.8571	.75	.5	.375
7.						.875	.5833	.4375
8.							.6667	.5
9.							.75	.5625
10.							.8333	.625
11.							.9167	.6875
12.								.75
13.								.8125
14.								.875
15.								.9375

14. Change the listed percent figures to decimals; change the listed decimal figures to percents.

a. 45 b. 16 2/3% c. .8 d. 3% e. .5%

f. 1.5% g. .255 h. .03% i. 123% j. 3/4%

15. a. The first year that Brookfield High School opened its doors, its enrollment was 1,200 students. Within three years, the enrollment jumped to 1600 students. What was the percent of increase during this period?

b. Attendance last Friday at Charleston High School was 92% of the student body. If 1,200 students are enrolled at the school, how many were absent that day?

c. Last season the basketball team at Falmont High School won 12 games and lost 8. What percent of the games played did the team win?

d. Over a 4 month period, Mary increased her typing speed from 42 words per minute to 60 words per minute. Her speed at the end of the period was what percent of her speed at the beginning of the period? (Round off to the nearest percent.)

e. Bob just bought a car from a local dealer. He borrowed the money ($350) from a friend who is charging him a straight 5% for one year. How much will it cost him to borrow the money?

f. How much is 25% of 384?

g. 886 is what percent of 1,000?

h. Find 1% of 254.95.

i. 95 is what percent of 47.52?

j. Find 432% of 106.

16. Obtain a yardstick or measuring tape from your instructor. Measure the following objects to the nearest 1/4 inch and enter the answer on the answer sheet provided.

a. a typing table (all dimensions)
b. a filing box (all dimensions)
c. the doorway leading into the room you are occupying
d. the dloor dimensions of the room you are in
e. the length of cloth provided
f. height of a particular student
g. length of a piece of string or cord
h. length of curtains provided in your classroom
i. width of curtains in a room at the school
j. height of the book shelves in the department

17. You will be given 10 physical objects to weigh. Record the weights to the nearest unit for the particular scale used and enter the answer on the asnwer sheet provided. You will be required to decide what scales to use.

a. a letter
b. a package
c. a ream of paper
d. a person designated by your instructor
e. a head of cabbage
f. a sack of candy
g. an over-sized mailing envelope
h. a teaspoon of salt
i. a small package of coffee beans
j. a roll of nickels

Note to Teacher:

It is suggested the teacher prepare or use a commercially prepared tape about an activity. Ask questions about the activity to see whether or not the student has demonstrated he is able to listen.

(Suggested activity)

When you arrive for work one morning in the tennis racket manufacturing company, Smith & Company, Los Angeles, California, you find a typewritten note on your desk from your employer. The note reads as follows:

"Please call the shipping department and tell them to send out 50 cartons of 'Smith' tennis rackets to our new customer in San Diego. They want to start selling these tennis rackets immediately so we have to have the rackets to them by Friday. Send the rackets to San Diego by Railway Express Agency. Also tell shipping department that we do not want to make out a bill for this shipment at this time. I told the company in San Diego that I would give them a special price on these rackets so I want to make out the bill myself. Please take care of this matter as soon as you get to work this morning. Thanks."

* * *

If you feel that you can remember the MAIN points, then turn the page and answer the questions (on a separate sheet of paper). DO NOT LISTEN TO THE INSTRUCTIONS WHILE ANSWERING THE QUESTIONS. After you have answered all the questions, listen to the instructions again in order to correct your paper. You should have 80% accuracy.

Materials Needed:

1. Test sheet
2. Prepared tape, playback unit, and lined paper
3. None

1. From the list of topics or role-playing situations, you will converse spontaneously with another student using standard pronunciation, diction, vocabulary, and grammar.

   a. Coming to work late
   b. Boss keeps you working after your regular hours
   c. One employee agrees to do something for another employee. The student doing the work does the work incorrectly.
   d. Sales grabbing (one employee grabs all the customers coming into the store)
   e. You observe an indnvidual shoplifting
   f. You observe another employee taking something from the department
   g. You observe another employee taking something from the department and he tries to get you involved
   h. Discuss your pay
   i. Promotion
   j. Dental or medical care insurance
   k. One student, as an employer, fires another student acting as an employee
   l. One student acts as a very aggressive salesman trying to secure a date with the secretary who does not wish to have such a date
   m. Teacher calls in as an irate customer; student reacts as a salesperson
   n. Friend keeps calling in for personal reasons during office hours and you want to stop these calls

2. After listening to the teacher-prepared tape about listening opportunities, you will demonstrate your listening skill by answering questions on that activity.

   (Please use a separate sheet of lined paper to record your answers)

   1. In what city do you work?
   2. What is the name of the company for which you work?
   3. What is your employer's name?
   4. What is the name of the product the customer wants?
   5. In what city does the customer wish to have the tennis rackets delivered?
   6. Why doesn't your employer want a bill made out for this shipment of tennis rackets?
   7. When are you supposed to make the telephone call about his shipment?
   8. How many cartons of tennis rackets does your new customer want?
   9. What department are you supposed to call with the message from your employer?
   10. What is the business of the company for which you work?

   Have you made a real effort to answer each of these questions correctly? If so, turn back to the instructions and check your answers. You should have answered all ten questions correctly!

3. Picking any item in the classroom, you will demonstrate your ability (for instance, to empty a pencil sharpener, or look up a synonym for a word in the dictionary) to communicate orally this activity to the satisfaction of the teacher. The teacher will ask questions to see if you fully understand the task. If you do not understand the task, you will ask questions of the teacher in order to complete the task correctly.

Note to Teacher:

It will be necessary for the teacher to fill in the blanks on this test with appropriate data.

Materials Needed:

1. Dictionary
2. Telephone directory
3. City directory
4. Zip Code Directory
5. Company employee handbook
6. California road map

1. You will use the (______________) dictionary and name three sections of the dictionary:

   1.
   2.
   3.

2. You will use the (______________) dictionary and give the proper spelling, definition, and word division of the following words:

   1. informtion
   2. consecutive
   3. ambigous
   4. acquision
   5. luxurous
      convience

3. You will use the (______________) dictionary and write in full the word represented by the 5 abbreviations listed below:

   1. chem
   2. USSR
   3. SW
   4. secy
   5. AZ

4. You will locate the following telephone numbers using your local directory:

	Phone Numbers
1. Department of Human Resources	______________
2. Directory Assistance	______________
3. Fire Department	______________

5. You will use the local telephone directory and list the telephone number for the following items:

		Names	Numbers
A. Personal Names	1.	______________	______________
	2.	______________	______________
	3.	______________	______________

5. (continued)

B. Business Firms

		Names	Numbers
	1.	__________	__________
	2.	__________	__________
	3.	__________	__________

C. Products, Brand Names, Services

		Firm	Number
1.	Office equipment	__________	__________
2.	Shell Oil	__________	__________
3.	Restaurant	__________	__________

D. Cities & Zip Code Number

	City	Number
1.	__________	__________
2.	__________	__________
3.	__________	__________

6. You will use the city directory and list the addresses of the following business firms:

	Firms	Addresses
1.	__________	__________
2.	__________	__________
3.	__________	__________
4.	__________	__________
5.	__________	__________

7. You will use the city directory and locate the names of the following people and write down the page number on which the names appear:

	Names	Page Number
1.	__________	__________
2.	__________	__________

8. You will use the Zip Code Directory and locate the zip codes for the following names and cities:

1. Mr. Lawrence C. Ownes
   Lillydale Court
   Lexington, KY __________

2. Mr. Harold Jones
   2987 Sandy Blvd.
   Portland, OR __________

3. Monroe Community College
   Rochester, New York __________

4. California cities:
   Belmont __________
   Sonora __________
   Mountain View __________
   Midway City __________

9. You will use the (______________) company employee handbook and list three fringe benefits, and two company rules:

Fringe Benefits	Rules
1. ______________	1. ______________
2. ______________	2. ______________
3. ______________	

10. You will use a California road map and locate and list the interstate highways leading into the following cities:

San Francisco ______________
Bakersfield ______________
San Diego ______________
Santa Barbara ______________

Answers:

1. Preface
   Front Matter
   Dictionary of English Language
   Back Matter

3. chemist
   Union of Soviet Republics
   southwestern
   secretary
   Arizona

Note to Teacher: None

Materials Needed:

1. Telephone message forms
2. Sales slips, tally sheet
3. Bank deposit slip, daily cash tally
4. Inventory control sheet, tally of previous inventory, requisition form

1. Teacher may dictate telephone message information on casette tape or give it as suggested.
2. Information for sales slips:

				August 6, 1973
Cash				
6	pkg	5x3 cards	.29	1.74
1	ea	Stapler, 8"	8.25	8.25
1	dz	Pencils, 2½	1.03	1.03
				11.02
		Tax		.57
		Total		11.59

				August 7, 1973
Cash				
12	pkgs	5x3 cards	.29	3.48
1	ea	Paper punch	8.34	8.34
2	dz	Pencils, 2½	1.03	2.06
				13.88
		Tax		.69
		Total		14.57

				August 8, 1973
Cash				
10	pkgs	5x3 cards	.29	2.90
1	ea	Paper punch	8.34	8.34
				11.24
		Tax		.57
		Total		11.81

				August 9, 1973
Cash				
5	pkgs	5x3 cards	.29	1.45
2	dz	Pencils, 2½	1.03	2.06
1	ea	Stapler, 8"	8.25	8.25
				11.76
		Tax		.59
		Total		12.35

2. (continued)

				August 10, 1973
Cash				
1	ea	Stapler, 8"	8.25	8.25
5	pkgs	5x3 cards	.29	1.45
2	dz	Pencils, 2½	1.03	2.06
				11.76
		Tax		.59
		Total		12.35

TALLY

		Cards, 4x6	Cards, 5x3	Paper, Mimeograph	Pencils, 2½	Punch, hand	Punch, paper	Staples	Stapler, 8"	
August 6										
August 7										
August 8										
August 9										
August 10										
Totals										

2. (continued)

Use whatever information is necessary to complete the following messages on the telephone message forms provided:

9:30 am	Dr. Charles Jones of Goleta Community Hospital, 16 Patterson Avenue, would like to call back at 2 pm. His number is: 259-1386.
10.00 am	Mr. Jack Allred of Coast Union High School District called. Wants an appointment at 7:45 pm to discuss personal item (415) 252-1111
11:30 am	The Long Distance Operator 8 from San Francisco telephoned and would like you to return a call - (218) 634-1400 - from Johnson + Johnson of the law firm of Johnson, Johnson + Rieger. Jack Jack

2. (continued)

Using the information given to you on the five sales slips, please enter in the proper column(s) the information to complete the tally sheet.

3. You will complete the total amount column and grand total on the daily cash tally form from the daily cash tally, you will record the necessary data on the bank deposit slip, and verify the accuracy of the figures.

4. Using the inventory control sheet and a tally of the inventory on hand, you will determine the number of items to be reordered, enter these items in the proper column, and complete the requisition form for resupplying the inventory to the former totals.

INVENTORY CONTROL SHEET

Number	Item	Unit Cost	Minimum Quantity	On Hand	Other
56-7781	Toothbrushes, 6"	.32	18	6	
56-7782	Lighters, cameo	4.35	6	1	
56-7783	Bats, baseball	7.36	34	22	
56-7784	Shoes, baseball	9.32	44	56	
56-7785	Paint, gal., blue	4.37	23	41	
56-7786	Varnish, pt., clear	.98	34	34	
56-7787	Sponges, 6"	.29	14	14	
56-7788	Balloons, 18"	.12	167	168	
56-7789	Racket, tennis, Wilson	9.88	13	3	
56-7790	Racket, tennis, Voigt	8.87	10	13	
56-7791	Racket, tennis, King	10.23	35	18	
56-7792	Toaster, bread	11.20	9	13	
56-7793	Roaster, Electronic	133.00	6	3	

All orders go to:

General Warehouse
AMEC, Incorporated
45 Amecia Lane
Lansing, MI 61678

Requisition Form

Note to teacher:

It is suggested that the teacher will prepare approximately 30 index cards (3" x 5"). Mark some of the cards with a large, handwritten number "1", "2", and "3". Other cards could be marked with a large, handwritten letter "A", "B", and "C". Still other cards could be color coded - actual colored cards or cards that are marked along the edges in orange, green, blue or other bright colors. When the cards have been properly coded, they could be shuffled like playing cards before the student attempts to use them for this sorting activity.

Prepare an answer sheet and a master list of names and addresses (50 recommended). Also prepare a set of envelopes - typing some of the names and addresses and handwriting others. The set of envelopes should include some errors (transpose numbers, Zip Code missing, typing errots, etc.). It is recommended that several sets of envelopes be developed so that the test will continue to be valid.

Prepare an answer sheet and 24 sales slips of various shapes (small, medium and large) and varying amounts. Also prepare an adding machine tape - making some errors so that the total of the problem on the tape will not match the corresponding sales slip total.

Prepare an answer sheet. You may use the prepared list of names and numbers provided or develop your own. If this list is used, prepare 25 index cards with the names and numbers - making some of the cards incorrect.

Materials needed:

1. 30 index cards
2. Set of envelopes and master list of names and addresses
3. 24 sales slips, adding machine tape
4. 25 index cards and master list of names and social security numbers

1. You will use 30 teacher-prepared index cards and sort the cards according to like colors, numbers, and alphabet.

2. You will use the master list of names and addresses to verify the names and addresses either written or types on the envelopes provided. Using the answer sheet provided, indicate whether the name and address on the envelope is incorrect by placing an "I" on the blank line.

3. You will use a set of sales slips and a corresponding adding machine tape of the sales slips (these will be provided by your instructor). Cut and sort the sales slips according to size and then arrange them in numerical order. Second, verify the total of each of the sales slips with the amount registered on the adding machine tape. An answer sheet is provided for this activity. When you find an incorrect total on the adding machine tape, mark an "X" in the blank provided beside the corresponding number.

4. Listed below are 25 names and numbers. You may recognize them to be social security numbers. Obtain the set of 25 index cards from your instructor; compare the names and numbers on the cards with this list. If the name and/or number on the card does NOT match the name and/or number listed below, place an "I" after the appropriate number on the answer sheet provided.

1) Bob Smith
558-07-0808

2) J. C. Howrey
332-40-3343

3) Sally Johnson
560-02-9183

4) Dick Sanders
587-82-0432

5) Robert Soske
547-72-2224

6) Phyllis Spiller
545-89-2348

7) Lois Bouchard
563-80-9231

8) Joe Buckton
554-86-9917

9) Charles Cosby
552-98-6438

10) Kay Goria
573-40-2345

11) Joan Harr
492-34-2947

12) Robert Hays
554-73-9482

13) Marty Jeffers
552-91-9101

14) Fawn McGinness
552-84-5815

15) Terrence Spitler
519-28-2141

16) Conway Terzich
558-58-1944

17) June Tingley
552-34-41194

18) Donald Trempe
551-84-6712

19) Betty Veatch
553-42-9141

20) Lynda Callahan
552-98-2597

21) Debbie Engle
553-58-2591

22) Walter Johnson
544-96-1790

23) Karlene Peetz
599-35-0908

24) John Uhlenhop
521-96-6613

25) Marie Truxillo
543-43-3387

5. You will copy each of the following names and addresses in alphabetical order in your own handwriting. After copying each item, work with another student in checking your work. Read each letter of each word. For example, the name Samuel Baker would be read S-a-m-u-e-l-B-a-k-e-r. Read each digit of each number. For example, 1,488 would be read as 1-4-8-8, NOT one thousand, Four hundred and eighty-eight.

1) Mrs. Harlan Hughes
5561 Smith Avenue
Richmond, California 93277

2) Mr. James Pryor
53 Broadstreet Avenue
Pueblo, Colorado 80205

3) Mrs. Alice Haunt
80001 Needle Street
New Orleans, Louisiana 70110

4) Captain Jack Q. Smithe
11 Apple Lane
Springfield, Illinois 62709

5) Miss Natalie Reede
Hollywood Recording Company
5342 Sunset Boulevard
Hollywood, California

6) Mr. Alvin Christen
815 North Prouty
Watonga, Oklahoma 73772

Note to teacher:

It is recommended that a tape be made of the spelling words. The suggested order of dictation: Say the word, use it in a sentence, repeat the word.

WARNING: Do not dictate the words too quickly!

Materials needed:

1. Answer sheet(s) for 75 answers
2. Prepared tape
3. Playback unit

Instructions: Secure the prepared tape marked "Spelling - Common Core" from your instructor and a playback unit. Each word will be dictated to you, used in a sentence and then repeated. You are to write the answers on the answer sheet provided.

1.	column	The column was completed by Betty.	column
2.	received	Terry received the guide book late.	received
3.	making	The cake that Fawn was making rose quickly.	making
4.	timing	The timing of the work was great.	timing
5.	letting	Joan was letting Joe assist her in the work.	letting
6.	customer's	The customer's account was in balance.	customer's
7.	coupon	Bob's coupon was lost in the mail.	coupon
8.	their	Their canoe was upset in the stream.	their
9.	saying	Lynda was saying that the work must be done quickly but efficiently.	saying
10.	please	Please do not forget to leave the door open for Kay.	please
11.	forgetting	Claire was not forgetting one item on the agenda.	forgetting
12.	Friday's	Friday's work was lead by Pat.	Friday's
13.	engine	John's engine was very hot.	engine
14.	there	He sat there among the trees with June.	there
15.	income	Brent said he reported the items for income tax purposes.	income
16.	replying	This was replying to Tom's letter.	replying
17.	offing	It was in the offing.	offing
18.	it's	It's the work that you wanted to give to Lois.	it's
19.	insurance	The students did insurance work in their typewriting classes.	insurance
20.	receipt	Charles was in receipt of the check for his work.	receipt
21.	sincerely	Many people sincerely like to work.	sincerely
22.	copying	He was copying the material on the copying machine.	copying
23.	order	When you give people work, always place it in alphabetic order.	order
24.	men's	Men's work is more difficult than women's work.	men's
25.	maintenance	The men were doing maintenance work on the typewriters.	maintenance
26.	committee	The sales were discussed in the committee meeting.	committee
27.	typing	She was typing the work for the salesman.	typing
28.	giving	She was giving him the manuscript for publication.	giving
29.	truly	Many hours of truly devoted work were shown in the guide.	truly
30.	can't	Terry can't get the car working.	can't

31. would	Would you get the paper for the mimeograph machine?	would
32. believe	He would believe what she had to say.	believe
33. pitiful	The customer was a pitiful sight.	pitiful
34. advising	The salesman was advising the client not to purchase the item.	advising
35. betting	The betting was illegal in California.	betting
36. system's	The system's code was broken by the FBI.	system's
37. outing	The children were taken on an outing.	outing
38. field	The various punches meant the field of the card.	field
39. earlier	The car arrived earlier than had been planned.	earlier
40. enclosing	The clerk was enclosing the letter.	enclosing
41. mapping	The survey was mapping the forest area around the city.	mapping
42. consumer's	The consumer's guide was found in the library.	consumer's
43. jewelry	The customer looked at the jewelry.	jewelry
44. relieve	Please relieve the desk clerk immediately.	relieve
45. ladies	The ladies were at the desk.	ladies
46. coming	The card was coming out of the key punch machine.	coming
47. snipping	The shipping charges were too high.	shipping
48. leaders	The leaders of the employees' group met with management.	leaders
49. government	The tax taken by the government is too large.	government
50. deceit	The deceit shown by the employee was too much.	deceit
51. daily	The daily bulletin was read to the group.	daily
52. noting	June was noting the missing pages in the book.	noting
53. dipping	The dipping stick on the car was broken	dipping
54. office	The office desk was delivered.	office
55. letter	the letter was mailed last week.	letter
56. other	The other day was Tuesday.	other
57. should	The man should have been at the committee meeting.	should
58. service	The clerk's service was excellent.	service
59. enclosed	The letter was enclosed in the envelope.	enclosed
60. manager	The sales manager put the clerk on probation.	manager
61. department	The manager of the department was promoted.	department
62. program	The sales program was one that could not be beaten.	program
63. amount	The amount of the sale was $99.95.	amount
64. attention	Judi has to get the group's attention before talking.	attention
65. number	The number seven was always lucky for Charles.	number

66.	possible	Was it possible for Terry to do that?	possible
67.	appreciate	Will you appreciate what has been done by them?	appreciate
68.	return	Please return the guide to the proper file case.	return
69.	president	The president was one that could give the work to the people.	president
70.	through	The brook wound its way through the forest.	through
71.	thank	Children are to be taught to say, "Thank You".	thank
72.	because	It was good because they had worked diligently upon it.	because
73.	credit	The credit application was held up by the manager.	credit
74.	members	The members of the group were given credit for their work.	members
75.	course	The course was liked by the new students.	course
	mail	The mail was taking too long to process.	mail
	company	The company wished to publish the work by the teacher.	company
	policy	The insurance policy was in the safe deposit box.	policy
	necessary	He felt that it was not necessary to retype the paper.	necessary
	stock	The sales stock in the store was low.	stock
	special	There was a special sale held at the furniture store.	special
	prices	The prices were marked down.	prices
	complete	Please complete the inventory.	complete
	paid	She was paid in cash.	paid
	entrance		
	pleasant		
	profit		
	group		
	mass		
	shipper		
	clearly		
	personnel		
	really		

Note to Teacher:

1. It is suggested that local phone numbers be inserted on the blank line.
2. Duplicate the test and checklists.

Materials Needed:

1. Test
2. Checklist

Outgoing Calls

Before you begin the test, read over the checklist that your teacher will be using to rate your performance.

Outgoing Local Calls:

1. **Location:** Marlow's Pharmacy, 221 W. Fifth Street, (your town)
   Person Calling: (you, as an office employee)
   Person to Call: Carrier Room Air Conditioners
   Phone Number: ______________
   Message: Office air conditioner has quit operating. Needs to be fixed this morning.

Outgoing Local Call Using Push-button Telephone:

2. **Location:** Peterson's Garage, 988 South Euclid Street, (your town)
   Person Calling: Gas station attendant
   Person to Call: S & R Automotive
   Phone Number: ______________
   Message: Peterson's Garage needs two smog control devices sent over today. Is this possible?

3. **Location:** Joli Plastics Company, 2248 North Towne Avenue, (your town)
   Person Calling: (you, as an office employee)
   Person to Call: Bill Barlot, Accountant
   Phone Number: ______________
   Message: Set up an appointment for your employer to see his accountant next week.

4. Income call from Casa Flores Flower Shop
   Place on "hold."

5. While call in question number 4 is on "hold," place the following call:
   Location: Bob's Orchids, 311 Austin Way, (your town)
   Person Calling: (you, as an office employee)
   Person to Call: Bill White, Orchids by White
   Phone Number: ______________
   Message: We are out of orchids. Could we send someone over to buy 6 orchids from your shop?

Outgoing Calls (continued)

6. Intercommunication Line (ICL)
   Location: Broadway Department Store
   Person Calling: Sales Clerk in Clothing Department
   Person to Call: Fred Baker, Credit Department
   Message: Mrs. Louise Parks is wanting to charge $49.25. Her credit card number is 495 68 3169 14.

Outgoing Long Distance Calls:

7. Location: Shaklee Products Distributor, 4487 East Comet, (your town)
   Person Calling: (you, as an employee)
   Person Called: Bill Green, Shaklee Products Distributor of Pomona, 28765 South Garey Avenue, Pomona, California
   Phone Number: (no number available)
   a. Person to person
   b. Bill Green is not in the office
   Message: Cancel the call. Will call later.

8. Location: Smith & Black Company, 258 East Grove, Ontario, California
   Person Calling: (you, as an office employee)
   Person Called: Texas International Airline
   Phone Number: Zenith 2-1150
   Message: Mr. Smith wants to fly to Albuquerque, New Mexico leaving Los Angeles about 2 p.m.

9. Location: Pancho Inn, 2256 State Street, Santa Barbara, California
   Person Calling: (you, as a restaurant employee)
   Person Called: Western Airlines
   Phone Number: (800) 453-5330
   Message: Employer wants you to make reservations on Western Airlines for his daughter to fly from Los Angeles to San Francisco next Thursday at 5 p.m.

Outgoing Calls (continued)

10. Location: Ulrich's Lamp Shades, 310 North Indian Hill Street, (your town)
    Person Calling: You
    Person Called: Jackie Luther, 857 Harrison Avenue, Susanville, California
    Phone Number: (916) 543-8923
    a. Charge call to your Telephone Credit Card Number 523-1541 242 U
    b. Station to station
    c. Jackie is not home.
    Message: You will be unable to call again today before 5 p.m. Please have Jackie return the call after 6 p.m. to this number (714) 987-2467. Call collect.

11. Location: Holiday Inn, 3055 De La Vina Street, (your town)
    Person Calling: (you, as an office employee)
    Person Called: Bob Brown, IBM Company, Los Angeles
    Phone Number: (213) 624-9041
    a. Dial direct
    b. Bob Brown is not in the office. You are to leave a message with the receptionist.
    Message: IBM Selectric Typewriter needs repair. It needs to be repaired today. The element on the typewriter is not moving properly. The machine is in the office at the Holiday Inn.

Incoming Phone Calls--Office Situations

Situation: You are an office employee at Magnapart Industries. One of your duties is to answer the push-button phone on your desk in the Sales Department. You may see the checklist your teacher will use to rate you.

Locate Called Person:

Name of Caller: Herman Longacre
Caller's Company: Ames and Ames
Phone Number: 625-9123
Situation: Mr. Longacre calls on a local line, asking for your boss, Mr. Martin. Mr. Martin is not in his office, but has told you he is going to see Mr. Ryerson in the Personnel Department. You offer to put Mr. Longacre on "hold" while you locate Mr. Martin. He agrees.

Variations of this call:
1. Mr. Longacre doesn't want to wait; he says he'll call back.
2. Mr. Longacre doesn't want to wait; he wants Mr. Martin to call him back.
3. It is the long distance operator with a person-to-person call for Mr. Martin from Mr. Field of Field Enterprises in New York. She wants Mr. Martin to call back when available.
4. It is a direct dialed long distance call from Mr. Field of Field Enterprises in New York. He wants to wait for Mr. Martin.

Wrong Number:

Name of Caller: Mr. Booth
Caller's Company: Internationa, Inc.
Situation: Mr. Booth calls for Mrs. Lee. You know there is no Mrs. Lee at Magnapart Industries.

Variation of call:
The same call comes in on an ICL. There is no Mrs. Lee in your department, but you offer to find her extension (or direct number) in the company directory.

Place on "Hold" if Requested Person is Busy:

Name of Caller: Wayne Richey
Caller's Company: Barry Brothers
Situation: Mr. Richey calls on a local line for your boss, Mr. Martin. Mr. Martin is talking on a long distance line. Mr. Richey agrees to wait.

Variations of the call:
1. Mr. Richey is calling from a pay phone; he says he'll call back later.
2. Mr. Richey doesn't want to wait; he wants Mr. Martin to call him back.
3. It is the long distance operator with a person-to person call for Mr. Martin from a man he has been trying to reach, Mr. Manning of Manning Mills in Chicago.

Incoming Phone Calls--Office Situations (continued)

Take a Message:

Name of Caller: Daniel Starr
Caller's Company: Starr-letts, Inc.
Phone Number: 848-4872
Situation: Mr. Starr calls on a local line to tell your boss, Mr. Martin, that Order No. 683-C, that Mr. Martin inquired about, will be shipped tomorrow. When Mr. Martin isn't there, he gives the message to you.

Give Information if Requested:

Name of Caller: Aaron Innes
Caller's Company: Marigold Stores
Situation: Mr. Innes calls on a local line to find out when his Purchase Order No. 1715-BC will be shipped. You can get that information for him, but you'll have to leave the line to go to a file for approximately two minutes. Mr. Innes "holds."

Refer Caller to Another Source for Information:

Name of Caller: Mr. John Budrick
Caller's Company: ABC Stockbrokers
Situation: Mr. Budrick calls on a local line for Mr. Stephen Hill, a Vice President of Magnapart Industries. Mr. Hill is located in your Executive Offices, not at the plant where you work. You give him the direct number of Mr. Hill, (213) 846-2141.

Variation of the call:
Mr. Starr's company is located in New York. He doesn't want to tell you about the order, but wants Mr. Martin to call him back at (212) 848-4872, his direct line.

Incoming Phone Calls--Distributive Education Situations

Before you begin, you should read the checklist your teacher will use to rate you.

Locate Called Person:

Situation: You are a sales clerk in the Shoe Department at the Major Store. The phone rings when you are closest to it. A customer wants to give a phone order to her regular salesman, Mr. Jenkins. You offer to locate him for her.

Situation: You are a gas station attendant at Willie's Service Station. Bob Murdock phones to see whether he can bring his car in right away for a grease job. You offer to locate the owner for him, since he is the only one who can give that information.

Wrong Number:

Situation: You are a waitress at Lo Chin's Restaurant. The phone on the wall rings when you are passing and you answer. It is a wrong number.

Situation: You are a box boy at Main Street Market. The pay phone outside rings as you are returning after loading groceries in a customer's car. You answer. It is a wrong number.

Place on "Hold" if Requested Person is Busy:

Situation: You are a sales clerk in the Camera Department at the Major Store. The phone rings and it is the Personnel Department on the ICL. They want Joe Moriarity, who just started working with you today, so they can get his social security number. Joe is just finishing a sale, so you put them on "hold"; then you go back on the line when another customer gets his attention before you do.

Situation: You are a gas station attendant at Willie's Service Station. Mrs. Williams calls to see when her car will be ready. You offer to put her on "hold" while you get Frank, the mechanic, to come to the phone.

Incoming Phone Calls--Distributive Education Situations (continued)

Take a Message:

Situation: You are a waitress at Lo Chin's Restaurant. You answer the phone and a secretary at Magnapart Industries, across the street, asks if they can come in for lunch with 18 people on Friday at 12:30. You know there is only one place in the restaurant where they can accommodate a party that size and you don't know if it is available Friday. Lo Chin is cooking, so you take a message so he can call back.

Situation: You are a checker at the Main Street Market. The Assistant Manager is called to the stockroom and you are next in charge. The phone in the office rings and you answer. It is one of the other checkers saying he is sick and won't be able to report for his shift. You take the message.

Give Information if Requested:

Situation: You are a sales clerk in the Sportswear Department at the Major Store. The ICL line rings and it is the Glenwood Branch Store calling to see if you have bathing suit Stock No. 87162 in size 16. You leave the line briefly, then return with the information.

Situation: You are a gas station attendant at Willie's Service Station. Mr. Grant calls to find out whether Willie has obtained a set of hoses for his car. You ask him to wait while you get the information from Willie, who is under a car.

Refer Call to Another Source for Information:

Situation: You are a waitress at Lo Chin's Restaurant. You answer the phone and it is a personal call for another waitress who is not on duty that day. Give the caller her phone number.

Situation: You are a checker at the Main Street Market. The Assistant Manager is busy and asks you to take the phone call. It is a customer who has just been in complaining about the quality of the prepackaged strawberries she bought. You sympathize and suggest she phone the buyer at the head office of the chain. His direct number is 888-2181.

CHECKLIST FOR INCOMING TELEPHONE CALLS	Test 1		Test 2	
	Pass	Repeat	Pass	Repeat
1. Preparation to receive calls a. Timepiece (watch or clock)				
b. Message pad				
c. Pen or pencil				
d. Intercompany directory of numbers				
e. Work schedule of important personnel				
2. a. Answer phone by third ring				
b. Identify company				
c. Greet caller				
d. Give company name or department if phone was previously answered at a switchboard				
3. a. Identify self				
b. Say your name				
c. Offer service				
4. Locate called party a. Local calls				
b. Long distance (1) Person-to-person				
(2) Station-to-station and direct dialing				
5. If wrong number a. Offer help or information to obtain correct number or extension				
b. Transfer back to switchboard, or				
c. Transfer through switchboard				
d. Transfer through push-button telephone				
6. Place on "hold" when requested person is busy a. Ask caller if he will go on "hold"				
b. Inform caller of status of call every 30-60 seconds				
c. Correct use of "hold" button				

CHECKLIST FOR INCOMING TELEPHONE CALLS (continued)	Test 1		Test 2	
	Pass	Repeat	Pass	Repeat
7. Take message--write down				
a. Time of call				
b. Date of call				
c. Name of caller				
d. Name of caller's company				
e. Telephone number of caller				
f. Content of speaker's message				
g. Any instructions about future contact				
h. Verify information (figures, spelling, etc.)				
i. Initials or name of message taker				
8. Give information if requested or				
9. Refer caller to another source for information				

CHECKLIST FOR OUTGOING TELEPHONE CALLS	Test 1		Test 2	
	Pass	Repeat	Pass	Repeat
Outgoing Local Calls:				
1. Preparation to place a call				
a. Phone book and list of commonly called numbers				
b. Pen or pencil				
c. Anticipated information and necessary references to be given if party called is unavailable				
d. Record sheet for toll calls				
2. Placing the call				
a. Locate name and number to be called				
b. Dial properly after hearing dial tone				
c. Allow sufficient ringing time (approximately 5 times)				
d. Use directory assistance when necessary				
3. If party called is unavailable either				
a. Leave word to return call				
(1) Clearly explain nature of call				
(2) Slowly and distinctly give information to be recorded				
(3) Have message confirmed				
(4) Express appreciation				
b. Cancel and place call later				
Outgoing Push-button Calls:				
4. Placing the call				
a. Select the proper trunk line				
b. Dial number properly after hearing dial tone				
c. Allow sufficient ringing time				
5. Receiving a call while placing a call				
a. Correct use of "hold" button				
b. Party informed of being placed on "hold"				
c. Continual check backs with party on "hold"				
d. Call properly transferred				

CHECKLIST FOR OUTGOING TELEPHONE CALLS (continued)	Test 1		Test 2	
	Pass	Repeat	Pass	Repeat
Outgoing Push-button Calls: (continued)				
6. ICL line				
a. Proper use of ICL line				
b. Dial correctly				
Outgoing Long Distance Calls:				
7. Placing the call				
a. Dial number properly after hearing dial tone				
b. Allow sufficient ringing time				
c. Use directory assistance if necessary				
8. Contact operator				
a. Give operator information				
(1) Credit card number, if appropriate				
(2) Name and number to be called				
(3) Type of call				
(a) Station-to-station				
(b) Person-to-person				
(4) Ask for time and charges and record information				
9. Enter following information on a record sheet or form for each toll call placed				
a. Person calling				
b. Person called				
c. Number of person called				
d. Location of person called				
e. Time used for call				
f. Charges on call--indicate whether charges include tax				

CHECKLIST FOR VOICE PERSONALITY AND QUALITIES	Test 1		Test 2	
	Pass	Repeat	Pass	Repeat
1. Alertness a. The speaker is giving full attention and interest in the person calling				
2. Naturalness a. The speaker is using his own words and expressions				
3. Pleasantness a. The speaker is projecting a friendly image with a warm, pleasing voice				
4. Distinctness a. Clear, distinct pronounciations				
b. The lips are one-half inch from the telephone mouthpiece				
5. Expressiveness a. Tone--uses a normal voice range--avoids loudness or softness				
b. Speed--talks at a moderate rate neither too fast nor too slow				
6. Courtesy a. Use of polite expressions such as "please" and "thank you"				
7. Grammar a. Use correct grammar--avoid using slang				

Note to teacher:

Tape a young man and a woman for the conversation. A suggested script is below. Be careful not to talk too rapidly.

Materials needed:

1. Answer sheet (35 questions)
2. Prepared tape
3. Playback unit

Script for tape (for question 4):

Bob: Good morning, Mrs. Harris. May I help you?

Mrs. Harris: Good morning, Bob. Yes, fill it with regular. By the way, is Mr. Thompson here?

Bob: No. He isn't here right now. He'll be back in about 30 minutes. Could I take a message?

Mrs. Harris: Well, my husband wanted me to ask him about bringing in his car for a grease job and at the same time check the brakes, tires, transmission and headlight alignment. He wants to leave to go fishing early Saturday morning. Do you suppose you could work on his car on Thursday?

Bob: I don't know Mr. Thompson's schedule for the rest of the week but I'll write a note so he will be sure to check it. Do you want him to call you or Mr. Harris?

Mrs. Harris: Better have him call Mr. Harris. Then he can make any final arrangements.

Bob: OK, Mrs. Harris. Thanks for coming in.

1. On the answer sheet, indicate the incomplete sentences by placing an "I" after the corresponding number.

   a. As you will be there tomorrow

   b. Charles went home early.

   c. The men will play pool at the house.

   d. When you meet me at the plane.

   e. Please fill in all the blanks

   f. I think so.

   g. When did each of us?

   h. Was the service station closed?

   i. Each summer the office is painted.

   j. At the head of the table were seated.

   k. Unless the stocks drop.

   l. All those boxes are his.

   m. After you read the material.

   n. When will we meet?

   o. Of all the people I have enjoyed.

   p. As you are not certain you will be there early enough.

   q. The display in the store is well placed.

   r. While I am here, we will see a show.

   s. Forced by a combination of circumstances.

   t. Have you some change for the telephone?

2. Re-write the following incomplete sentences.

   a. Thanking you for your letter.

   b. The telephone ringing.

   c. I be right back.

   d. As it is not ready yet.

   e. If I get to work tomorrow.

3. In your best handwriting, write the words in each sentence that need capitalization. Use the spaces provided on the answer sheet.

   a. he read the book, one flew over the cuckoo nest.

   b. mrs. veach had an appointment with president tingley.

   c. joe's dad has a service station in live oak, utah.

   d. the group will meet on tuesday, august 7.

   e. what are the scores in english, math, and science?

4. Obtain the tape for this portion of the test marked "WRITTEN COMMUNICATION".

   You are the only attendant at the service station. Your employer has gone home for lunch. He asks that you write all messages on a note pad when he is gone. Listen to the conversation on the tape between Bob (you) and Mrs. Harris. Write the message, making no serious errors in word usage or punctuation.

Note to teacher:

1. Prepare a fluid master; have available yellow duplicating paper.
2. Prepare an offset set master; have available white paper.
3. Prepare a sharp, clear, black-typed letter; have available white paper.
4. Prepare a stencil master; have available green mimeograph paper.
5. Collect old file folders and store in a central location.
6. Prepare a three-page magazine article to be collated; have available stapler and staples.

Materials needed:

1. Prepared fluid master and yellow duplicating paper
2. Prepared offset master and white paper
3. Letter to be used in question #3 and question #5
4. Prepared stencil master and green mimeograph paper
5. Discarded file folders
6. Three-hole punch and 3-hole binder
7. Stapler and staples
8. Three-page magazine

Directions:

Provided in this test package is a checklist that your teacher will be using to rate your performance. Please read it carefully before beginning the test.

1. You will use a prepared fluid master and the fluid duplicator to duplicate five legible copies on 8-1/2" x 11" yellow paper so that the copy is properly centered and aligned.
2. You will use a prepared master and the offset printer to duplicate five legible copies on 8-1/2" x 11" white paper so that the copy is legible and free of smudges.
3. Please use the letter provided by the teacher and the photocopier machine to prepare one legible copy on 8-1/2" x 11" white paper so that it is properly placed on the page.
4. You will use a prepared stencil master and a mimeograph machine to duplicate five legible copies on 8-1/2" x 11" green paper so that the copy is properly centered and aligned. Clean the master for storage.
5. Please use a letter provided by the teacher and the thermal copier to produce a single copy, one fluid duplicator master, one thermal stencil, and one overhead transparency. You will duplicate one copy from the fluid master and one copy from the thermal master on 8-1/2" x 11" white paper. All copies must be legible and be appropriately placed on the page.
6. Use discarded file folders and the paper cutter to cut ten 3-1/4" x 5-1/2" postal cards. Stack finished products neatly.
7. Punch five pieces of paper using the three-hole punch so that the holes will be uniform and the paper can be placed in a standard 3-hole binder.
8. You will collate three complete sets of a three-page magazine article according to the page numbers. Please staple one set in the upper left-hand corner; staple one set to be top-bound; staple one set to be left-bound.
9. You will properly load an empty stapler so that it will operate properly.

DUPLICATING CHECKLIST

CHECKLIST FOR FLUID AND MIMEOGRAPH MACHINES	PASS	REPEAT	PASS	REPEAT
1. Inking				
a. Check ink or fluid supply				
b. Check ink or fluid flow to cylinder				
2. Adjusting Paper Feed System				
a. Check paper feed mechanism				
3. Producing Copy				
a. Place master correctly on cylinder				
b. Produce single test copy				
4. Copy Adjustments				
a. Check centering and alignment				
b. Adjust machine if necessary				
5. Run off final copies				
a. Free of smudges				
b. Free of wrinkles or marks caused by wrinkled master				
c. Legible				
d. Appropriate placement on page				
e. Remove master				
f. Clean master for storage, if appropriate				
6. Clean-UP				
a. Clean machine				
b. Clean work area				
7. After Clean-UP				
a. Leave drum in correct position				
b. Cover machine				

DUPLICATING CHECKLIST

CHECKLIST FOR OFFSET MACHINE	PASS	REPEAT	PASS	REPEAT
1. Inking				
2. Moistening				
3. Adjusting Paper Feed System				
4. Adjusting Receiving System				
a. Feed Single Sheet				
b. Automatic Feed				
5. Producing Copy				
a. Wet plate				
b. Motor on				
c. Set aquamatic control lever				
d. Set ink fountain control lever				
e. Turn on form roller control lever				
f. Image development control				
g. Feed lever				
6. Copy Adjustments				
a. Angular				
b. Lateral				
c. Vertical				
7. Clean-Up				
a. Manual				
b. Automatic				
8. After Clean-Up				
a. Remove clean-up mat				
b. Wipe rollers and tray dry				
c. Ductor roller and ink fountain				
d. Form roller and aquamatic controls levers on night latch				

DUPLICATING CHECKLIST

CHECKLIST FOR PHOTOCOPY AND THERMAL COPY MACHINES	PASS	REPEAT	PASS	REPEAT
1. Producing Copy a. Place and align document				
b. Follow manufacturer's instruction for machine use				
2. Run off final copies a. Legible and clear copies				
b. Properly placed				
c. Remove source document				
3. Clean-Up a. Clean work area				

DUPLICATING CHECKLIST

CHECKLIST FOR PAPER CUTTING, HOLE PUNCHING, COLLATING AND STAPLING	PASS	REPEAT	PASS	REPEAT
1. Paper Cutting				
a. Paper cut to exact size specified				
b. Neat and uniform edges				
c. Neatly stacked				
2. Hole Punching				
a. Holes in locations specified				
b. Uniform spacing between holes punched and edge of paper				
3. Collating				
a. Pages gathered in correct order				
b. Pages head to head				
c. Pages aligned				
4. Stapling				
a. Staple holds through all pages				
b. Placement of staples:				
- Corner stapled documents				
- Top-bound stapled documents				
- Side-bound stapled documents				
5. Filling a stapler				
a. Load stapler so it operates properly				

Note to teacher:

From the suggested master list prepare 50 cards or documents to be alphabetized and placed in numeric order.
From the suggested master list prepare 10 documents and a number of folders for these documents.
Prepare requests for retrieving of documents from file folders.
Establish a numeric file of approximately 50 cards.

Materials needed:

1. 50 cards of documents
2. 10 documents and file folders (labeled)
3. 3 requests for filed material; file folders with materials; charge out form
4. Numeric card files and cards

Suggested Master List (in alphabetic order for convenience)

M C A Sales & Service Corp.	213	331-7123	Covina
M-D Electric, Inc.	213	332-8799	Covina
M D B Realty Company	213	334-7834	Azusa
M D X Pharmacy	213	969-8456	Azusa
M & F Furniture Manufacturers	213	335-4567	Glendora
M H Pet Food	213	963-8900	Glendora
M & M Decors	213	964-6745	Rowland Heights
M & M TV & Appliances	714	620-8888	Pomona
M & N Restaurant Equipment Sales & Service	714	622-2346	Pomona
M & R Catering & Bridal Service	714	629-8904	Pomona
M & R Ranches	714	621-4056	Claremont
MSI Data Corporation	714	624-5690	Claremont
MTA	714	626-4578	Claremont
MTI Business College	714	982-4578	Upland
M & W Auto Sales & Camper City	714	985-4580	Upland
Ma Thomas	714	944-3467	Whittier
Maakestad, Catherine	714	945-5666	Whittier
Maas, Ernie J.	714	947-8888	Whittier
Maass, George O.	714	949-5234	Whittier
Maass, Jane	714	684-4536	Riverside
Mabe, Virginia M.	714	685-7865	Riverside
Mabee, A. W.	714	686-5656	Riverside
Mabon, O. M.	714	687-4545	Riverside
Mabrey, W. F.	714	736-6777	Corona
Macalpin, Herbert	714	737-9444	Corona

Suggested Master List

File folders labeled: A, M, R

Suggested inside addresses to be placed on letterheads if no letters are available.

Ameron Pipe Products
12459 Arrow Highway
Etiwanda, CA 91739
January 31, 1973

Ameron Pipe Products
12459 Arrow Highway
Etiwanda, CA 91739
February 28, 1973

Ameron Pipe Products
12459 Arrow Highway
Etiwanda, CA 91739
March 11, 1973

Mr. Charles W. Amos
365 E. Monterey Avenue
Cucamonga, CA 91730
March 11, 1973

Anderson Appliance Service
240 N. Prospectors Road
Diamond Bar, CA 91765
March 3, 1973

Anderson Appliance Service
240 N. Prospectors Road
Diamond Bar, CA 91765
December 25, 1973

T. D. Robbins
P.O. Box 521
Fillmore, CA 93015
March 23, 1973

Marty's Appliance Service
219 N. Sultana Avenue
Ontario, CA 91764
April 20, 1973

McGinness Hotel
975 W. Hold Avenue
Pomona, CA 91768
May 25, 1973

Mae Lois Cosmetics
191 N. Euclid
Saugus, CA 91350

Jeffers Bar Cafe
662 Foothill Blvd.
Claremont, CA 91711
March 3, 1973

Master Rooter
514 W. Emporia Ave.
Upland, CA 91768
May 20, 1973

Matich Corporation
840 E. 20th Street
Canyon Country, CA 91351
May 10, 1973

Rieger Renta Car, Inc.
1801 East G St.
Fillmore, CA 91350
April 2, 1973

Ray's Sportswear
10 Rubio Rd.
Santa Barbara, CA 93070
April 1, 1973

Roberts
1500 E. Holt Avenue
Pomona, CA 91768
April 10, 1973

Roberto's Pizza
2811 S. Diamond Bar Blvd.
Diamond Bar, CA 91765

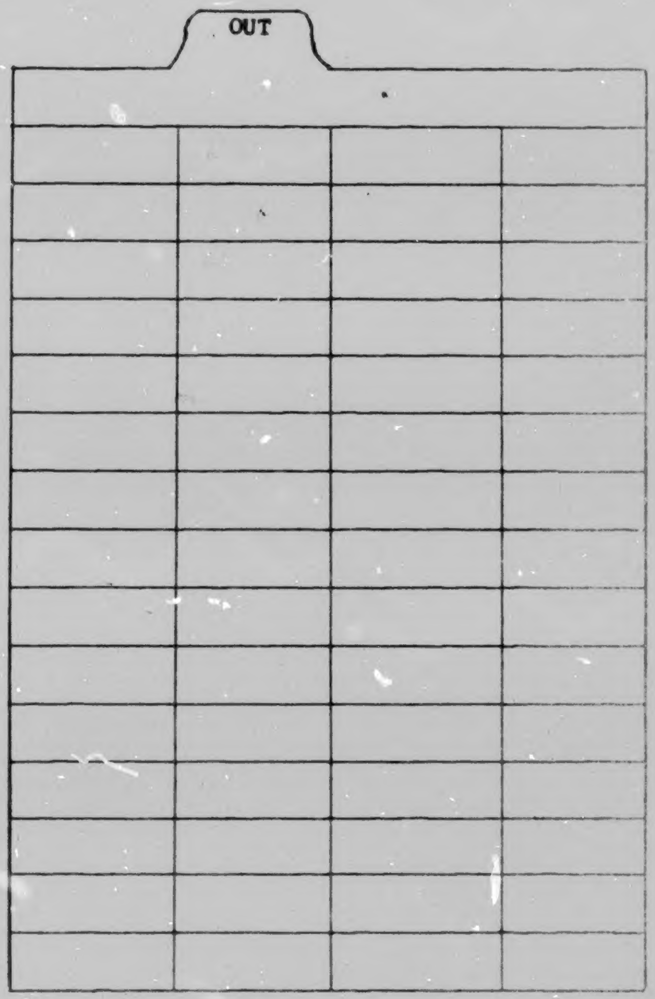
Mr. Scott Robinson
12726 Summit Avenue
La Habra, CA 90638
February 15, 1973

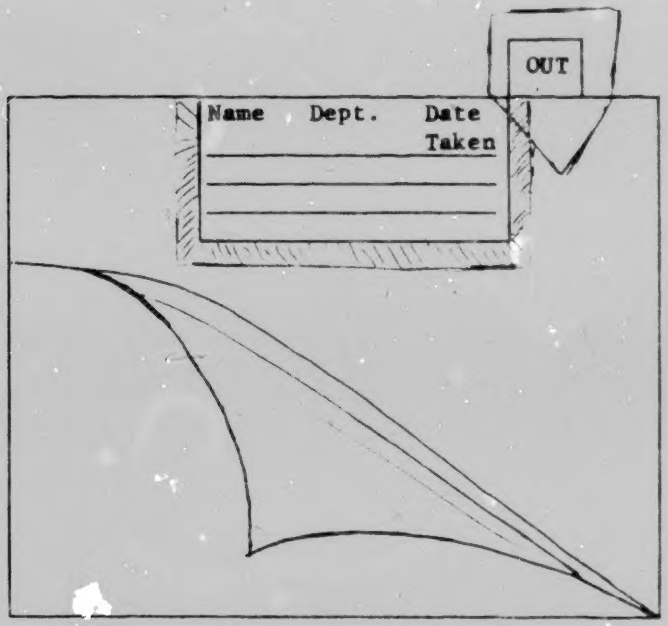
Mr. Tingley Robb
1601 N. Indian Hill
Temple City, CA 91780
February 19, 1973

T. D. Rollins
2050 Cooley Avenue
Montebello, CA 90640
March 3, 1973

T. D. Robbins
P.O. Box 521
Fillmore, CA 93015
March 3, 1973

Substitution Card





Each item on the suggested master list should be typed on 3" x 5" cards.

A1000.01	btls	Mucilage, 1½ oz, with spreader	.095
A1000.02	btls	Mucilage, 3½ oz, heavy duty	.15
A1000.03	btls	Glue, 8z., cans	.60
A1000.04	doz	Cement, rubber, 4 oz.	2.36
B1012.08	doz	Brushes, artists, 1"	4.32
C1020.10	pkg	Cards, 5" x 3", plain, green	.124
C1040.03	box	Clips, paper, jumbo	.247
E1055.07	box	Evenlopes, filing, expand 1-3/4", manila, 9½" x 11-3/4"	3.35
F1070.06	ea	File boxes, metal 5 x 8 x 6	1.99
I2000.18	tube	Ink, stamp pad, black, 2 oz, bottle	.235
L2010.02	box	Labels, gummed, Rol-Labels, buff	.24
P2020.01	box	Pads, buff, B & P Legal #4138 (10/box)	3.20
P2030.71	ream	Xerox paper, 8½ x 11, white	1.27
P2030.72	ream	Xerox, paper, 8½ x 13, white	1.50
P2030.73	ream	Xerox paper, 8½ x 14, white	1.61

FILING AND RETRIEVING TEST

COMPETENCY 202.03/202.04

You will be given 50 documents (cards, letters, etc.). Please arrange these documents according to alphabetic and numeric filing rules. The documents needing numeric filing will be arranged by area code, then by prefix. The second set of cards will be used to alphabetize by the city only.

Being given file folders and 10 documents, you will place all documents alphabetically in chronological order within each folder.

From the files (alphabetic and numeric) given to you, retrieve the items on the following requisition slips.

You have in your possession a numeric file and are given a group of numbered documents. Please file the documents numerically within that numeric file.

Note to teacher:

1. Prepare ten pieces of mail:
   One envelope marked "PERSONAL"
   One envelope marked "CONFIDENTIAL"
   One letter with an enclosure
   One letter with an enclosure missing
   Three different one-page letters
   One letter with two enclosures
   One letter with two enclosures and one enclosure missing
   two-page letter

   Some letters should be addressed to individuals and others should be addressed to departments.

2. Prepare ten pieces of outgoing mail:
   a. Envelopes should have local addresses, out-of-town addresses, and some to be sent airmail.
   b. Prepare 5 small and 5 large envelopes to accompany all mail. At least two addresses on the envelopes should differ from the address on the letters.
   c. Five single page letters
      One two-page letter
      Two letters with two enclosures
      One letter with one enclosure
      One letter in which the enclosure is missing

3. Prepare ten pieces of interoffice mail:
   Mail should be routed to at least 4 different departments. Other mail could be routed to individuals.

Materials needed:

1. Ten pieces of incoming first-class mail
2. Ten pieces of outgoing mail
3. Ten pieces of interoffice mail

MAIL (INCOMING AND OUTGOING) TEST

Before beginning this test, you may wish to read over the Checklist which the teacher will be using to evaluate your performance.

- -

1. You will process the ten pieces of incoming mail and be prepared to distribute the pieces of mail to the proper individuals and/or departments.

2. Please process the ten pieces of outgoing mail and prepare them for the "outgoing" mail basket.

3. Using the ten pieces of interoffice mail, you will process the mail and be prepared to distribute it to the individuals and/or departments.

Mail Checklist

CHECKLIST FOR INCOMING MAIL	PASS	REPEAT	PASS	REPEAT
1. Open all but "personal" or "confidential" mail				
a. Contents not damaged				
b. Remove all contents of envelope				
c. Attach envelope to correspondence				
d. Attach enclosures to cover letter				
e. Note on letter if enclosure missing				
2. Stamp mail				
3. Sort mail to be delivered to individuals or departments				

CHECKLIST FOR OUTGOING MAIL	PASS	REPEAT	PASS	REPEAT
1. Sort all mail according to destination or class				
2. Check for proper enclosures:				
a. Obtain enclosures from files, if requested				
b. Return to originator if letter is not complete				
3. Separate mailable copy and file copy				
a. Route file copy to file clerk				
4. Verify correctness of address on document and corresponding envelope--return to originator if different				
5. Fold mail properly to fit envelope				
6. Insert in appropriate size envelope				
7. Seal envelope and place in "outgoing" mail basket				

CHECKLIST FOR INTEROFFICE MAIL	PASS	REPEAT	PASS	REPEAT
1. Open all interoffice mail				
2. Time stamp mail				
3. Sort mail to be delivered to individuals or departments				

Note to teacher:

Prepare a check to establish a petty cash fund.

Materials needed:

1. Petty Cash Voucher Forms
2. Petty Cash Summary Sheets
3. Receipts to reimburse
4. Blank check to replenish petty cash fund

You receive a check in the amount of $25 to establish a Petty Cash Fund. The forms necessary to operate the fund are given to you.

The seven receipts provided are from employees who have authority to be reimbursed from the petty cash fund. You will reimburse the people. Record the receipts on the proper form and reestablish the balance in the petty cash fund.

GEM, Inc.
500 Main Street
Gemsville, CA 93450

No. 13456

90-30
1211

June 28, 19 73

Pay to the order of Petty Cash $25.00

---Twenty-five and no/100----------------------------------- Dollars

Specimen

FIRST NATIONAL BANK
1001 First Street
Gemsville, CA 93452

GEM, Inc.

____

ON____________________________, the Petty Cash Fund
date
of GEM, Inc, has been given to me to handle. At this time, I counted the contents of the petty cash box and found the following:

Cash $____________

Vouchers Nos._____ to_____

Total fund $____________

Signed:______________________________

Light Cleaning Company

Date July 3, 1973

# Item	Description	Amount
3	Miller's office	$3.00
	Tax	.18
	Total	$3.18

PAID

Safeway

2.97 TL
.17 TX
2.80 ST

1.00 GR
1.20 GR
.60 GR

July 1, 1973

6

Room 57 Name GEM, Inc.

Rate $6.60 ↓

Date	Room Charge	Tax	Phone	Amount Rec'd.	Bal.	
7/13	6.60	.40		7.00	0	rc

Forward to Registration No. Bal. Fwd.

MOTEL 6
350 Oak Street
Bakersfield, CA 93304

Location Stay

Received of

GEM, Inc.

$6.00 for 100 postal cards

U.S. POSTAL SERVICE

GRANTS

.70
1.25
.50
.20
1.13
.25
2.12
1.25
.25
.30
.05
8.00 Sub Total
.48 Tax
8.48 TL

Fillmore Drug Co.

Date July 14, 1973

Item	Unit	Description	Amount
1	bx	Bandaids	$ .75
1	bt	Aspirin	3.25
1	tube	Kip	1.23
			5.23
		Tax	.31
	Paid	Total	$5.54

AIR-HOST AIRPORT HOTEL

Single accommodation requested

Folio Room

Clerk Rate $18.00 + Tax

7/5 Arrival Date to 7/6 Departure Date

Name John Miller

Firm Gem, Inc.

Address 500 Main Street

City Gemsville, CA 93450

METHOD OF PAYMENT

Master Charge ☑ Bank of America ☐ Personal Check ☐ Cash ☐

PETTY CASH SUMMARY

From____________________, 19___ to ____________________, 19___

Audited by Approved by

Date	Voucher No.	To Whom Paid	For What	Acct. No.	Amount

DISTRIBUTION

GEM, Inc
500 Main Street
Gemsville, CA 93450

No.__________

________________ 19___

90-30
1211

Pay to the
order of______________________________________ $__________

Specimen

____ Dollars

FIRST NATIONAL BANK
1001 First Street
Gemsville, CA 93452

GEM, Inc.

____

Note to teacher:

It is recommended that a tape be made of the spelling words. The order of dictation might be: say the word, use the work in a sentence, and then repeat the word.

WARNING: Do not dictate the words too quickly!

Materials needed:

1. Tape
2. Playback unit
3. Answer sheet

Suggested tape for Spelling - Office Core:

"On this Spelling - Office Core tape, you will be given 75 common business words. Depending upon the request of your teacher, you will write, type or orally spell these 75 words. If you type, or write the words, you will need an answer sheet. The word will be given once, the word will then be used in a sentence, and then the word will be repeated one time."

1.	athletic	The girls were invited to the athletic banquet.	athletic
2.	piece	The piece of chocolate cake was eaten by Betty.	piece
3.	laid	June's hat laid on the table for several days.	laid
4.	writing	The writing paper belonged to Conway.	writing
5.	equipping	Terry was equipping his office for his secretary.	equipping
6.	your	Your book was found by Lois.	your
7.	rural	Tom lives in a rural area.	rural
8.	receipts	Bob's receipts were kept in the file.	receipts
9.	said	She said: "Bring me $5 for the dinner."	said
10.	argument	Don't get into an argument with your sister.	argument
11.	beginning	Beginning the problem in a positive manner will help.	beginning
12.	its	The company developed its policies.	its
13.	action	Kay was where the action was.	action
14.	receive	Judi was to receive the papers to be typed.	receive
15.	satisfied	Claire was satisfied with the work.	satisfied
16.	debating	The debating team was winning high honors.	debating
17.	omitting	Gene was the one omitting sugar from his oat meal.	omitting
18.	week's	The week's work was done in two days by Lynda.	week's
19.	appear	Joan was one to appear at the committee meeting on time.	appear
20.	neither	Niether Charles or Bob were able to fly home.	neither
21.	applied	The seal was applied to Mary's certificate.	applied
22.	duly	Joe was duly installed as president.	duly
23.	actually	Actually the mark was done by the other student.	actually
24.	their	Their luggage was found on the dock.	their
25.	attention	The attention of the group was superior.	attention
26.	relieve	The night clerk was to relieve him of the work.	relieve
27.	varied	There were varied reactions to the problem.	varied
28.	enclosing	She was not enclosing the enclosures as requested by the boss.	enclosing
29.	embarrassing	The salesman was embarrassing the secretary.	embarrassing
30.	won't	Won;t you help the child across the street?	won't
31.	voucher	The sales voucher was lost in the mail.	voucher
32.	achieve	The group was able to achieve their objective	achieve
33.	beautiful	It was a beautiful dog.	beautiful
34.	careful	You must be careful of all equipment.	careful
35.	legally	It was legally binding on the group.	legally
36.	children's	The children's manual was published.	children's
37.	weight	His weight was too high.	weight
38.	marriage	The marriage took place in the church.	marriage

39.	become	The stenographer will become a secretary.	become
40.	ninth	This is the ninth inning of the game.	ninth
41.	stressing	The student was stressing his point to the other group.	stressing
42.	entrance	Your book was left at the entrance to the lobby.	entrance
43.	chance	We all like to give him a chance.	chance
44.	fierce	The man put up a fierce battle.	fierce
45.	victorious	The cat was victorious in the battle.	victorious
46.	truly	It truly was a beautiful day.	truly
47.	expelling	They were expelling him from school	expelling
48.	couldn't	Couldn't you reach her by telephone?	couldn't
49.	cooperate	Can't you cooperate with your fellow workers?	cooperate
50.	grief	There was a lot of grief in his life.	grief
51.	curiosity	There was great curiosity about the office.	curiosity
52.	client	He was a client of the lawyer.	client
53.	earliest	This was the earliest that he came to work.	earliest
54.	dying	The dying of the cloth was not done satisfactorily.	dying
55.	stopping	Betty was not stopping at the store.	stopping
56.	school	June was at the school very late.	school
57.	changeable	Lynda was not changeable.	changeable
58.	needy	Charles was always helping the needy.	needy
59.	proprietorship	Terry was in the proprietorship.	proprietorship
60.	angle	Kay was sitting at the wrong angle to take the picture.	angle
61.	merchandise	Bob was setting up the merchandise display.	merchandise
62.	financier	Tom was a well-known financier.	financier
63.	furious	Don was furious at the dog.	furious
64.	mileage	Mary had put on the most mileage for the trip.	mileage
65.	hopping	Marty was hopping about the room.	hopping
66.	regret	Lois did not regret the work done.	regret
67.	locally	The picture was produced locally.	locally
68.	object	He did not object to the picture being taken.	object
69.	capital	He forgot to put the capital letter on the paper poster.	capital
70.	can't	Can't it be forgotten?	can't
71.	manufacturer	The manufacturer of the doll was doing an excellent job.	manufacturer
72.	review	The film review was very good.	review
73.	saying	He was not saying what the raise would be.	saying
74.	boundary	The boundary between the two lots was surveyed.	boundary
75.	swimming	She was swimming in the pool.	swimming

In the groups of three words below, one is spelled incorrectly. Write the incorrect work in the correct form on the answer sheet. If all words are correct, place a "C" in the corresponding space on the answer sheet.

1. truley would please
2. office ajent loyalty
3. policy telphone department
4. copy appreshiate president
5. through check durring
6. available insurance monnth
7. since thank tooday
8. credit bekause members
9. school course meating
10. being kompany committee
11. present used however
12. people necesary part
13. stock above spesial
14. prices full could
15. home received tax
16. where line three
17. call complete lest
18. following card payed
19. interested without intrest
20. further memeber general

Note to teacher:

1. Secure timed write paragraphs of syllabic intensity of 1.5.
2. See checklist attached.
3. Prepare paragraphs, one with incorrect copy, one with correct copy.
4. Provide eraser, correction tape, fluid, copy material.
5. Prepare copy (printed or typed, edited, handwritten).
6. Prepare words to divide, answer sheet.
7. Prepare original document (letter).
8. Checklist.
9. Prepare material for 5" x 3" cards and a postal card.
10. Prepare list of data for labels.
11. Prepare letter/memo (printed or typed arranged form, simple rough draft, handwritten rough draft).
12. Prepare mailing list with special notations, envelopes large and small.
13. Prepare a request to type a letter/memo, a copy of a letter/memo, and a prepared enclosure.
14. Prepare a request to type a letter/memo, a copy of a letter/memo, (This could be same letter, etc. as in No. 13).
15. Prepare a letter/memo to be folded by the student.
16. Prepare edited rough draft of two-page manuscript with footnote and instructions for style and binding.
17. Complete an invoice, etc., requiring skill in typing (on lines, in boxes, after guide words, in columns) and minimal instructions.
18. Prepare a one-page source document (typing, lines, simple decorative material to be drawn by hand), placement instructions.
19. Prepare a one-page sharp, clear, black typed source document with appropriate placement instructions. (This could be same materials as in No. 18) Thermal copy machine
20. Prepare one-page sharp, clear source document with appropriate placement instructions. (This could be same materials as in No. 18) Copying machine

    Prepare a suggested checklist to help evaluate all typing on this test.

Materials needed:

1. Paragraphs of syllabic intensity (1.5), sheet of paper
2. Checklist
3. Paragraph with correct copy and paragraph with incorrect copy
4. Eraser, correction tape, correction fluid, copy needed to be corrected
5. Copy (printed, typed, edited, handwritten), clean sheet of paper
6. List words to divide, answer sheet
7. Original document, carbon paper, (snap-apart and carbonless if available), form of original document
8. Checklist - care of work station
9. 5" x 3" cards, postal cards, source documents
10. Labels, blank and continuous form, list of data
11. Source document, instructions regarding typing the document (carbon paper if desired)
12. Large and small envelopes, mailing list
13. Request to type a letter, completed enclosure, letterhead, material for letter
14. Request to type a letter, carbon paper, envelope, letterhead, second sheets
15. Prepared letter/memo, envelope
16. Edited rough draft for 2-page manuscript with footnote, instructions for style and binding, style guide, sheets of paper
17. Source documents and form (requiring typing on lines, in boxes, after guide words, in columns) and instructions, (carbon copies of form if necessary)
18. Duplicator masterset, one-page source document, placement instructions, correction aids
19. Source document, placement instructions, correction aids
20. Source document, placement instructions, correction aids

CHECKLIST FOR PROPER CONTROL OF TYPEWRITER	PASS	REPEAT	PASS	REPEAT
1. Adjustments Paper guide				
Margin stops Left				
Right				
Tab mechanism Clear				
Set				
Paper release lever				
Carriage release lever Left				
Right				
Line space regulator				
Variable line spacer Above line				
Below line				
Ratchet release				

Indicate on the answer sheet provided the correct end of line decisions on the following words according to typewriting rules:

1. state-ment
2. ship-ment
3. shipped
4. quickly
5. amount
6. began
7. regu-late
8. haven't
9. Thomas
10. collec-tion
11. omit-ted
12. referred
13. busi-ness
14. let-ter
15. gentle-men
16. ser-vice
17. man-ager
18. depart-ment
19. pro-gram
20. atten-tion
21. sepa-rate
22. appreci-ate
23. gradu-ation
24. depend-able
25. unwill-ing

announce-ment
expend-able
repeti-tive
atten-tive
instruc-tion

CHECKLIST FOR RESPONSIBILITY FOR CARE OF TYPING WORK STATION	SATISFACTORY	NEEDS IMPROVEMENT
You have demonstrated your responsibility for the care of your typewriter work station by: 1. Dusting the machine and the desk		
2. Cleaning typebars or element		
3. Changing the ribbon, when necessary		
4. Reporting need for repairs according to established procedure		

GEM, Inc.
P. O. Box 521
Fillmore, CA 93015

PURCHASE ORDER No. 4438-B

Date: June 28, 1973

TO: Lynda's Music Center
1900 Indian Hill Road
Claremont, CA 91711

Please ship and bill us for the goods listed below. Please refer to our Purchase Order number (above) in all communications.

Ship Via: United Parcel Service

Quantity	Description	Catlg. No.	Unit Price	Amount
150	MasterRadio portable TVs	RP66	98.75	14,812.50
75	MasterRadio AM/FM table radios	F97TR	50.00	3,750.00
35	MusicRadio portable radios	T75V	12.50	437.50
		Subtotal		19,000.00
		Sales Tax		1,140.00
		Grand Total		20,140.00

_______________________Auditor

PERFORMANCE

OBJECTIVES

Outline

by

(Your name)

(Your School and address)

1. You will be given several paragraphs from which you will touch type for a period of five (5) minutes. Your errors should not exceed two per minute or a total of 10 for the five minute timed write. Please indicate when you are ready to begin and you will be timed.

2. When you are ready to be checked on whether or not you can demonstrate proper control of margin set, tab mechanism, paper release, carriage release, line space regulator, variable line spacer, and ratchet release, check with your instructor. Prior to being checked you may secure a copy of the checklist if you so desire.

3. You will be given a correct copy of typewritten material and a copy of typewritten material containing typographical errors. Please locate and mark the errors on the incorrect copy with no more than two undiscovered errors from the 20 errors.

4. Using the eraser, correction tape, and correction fluid provided you, correct the errors on the copy using the right correction aid on the copy that has been typed previously.

5. From the handwritten copy given to you, type a rough draft making the necessary corrections as edited or marked.

6. On the answer sheet provided, please type the acceptable typewriting word division of the words listed below:

    1. statement
    2. shipment
    3. shipped
    4. quickly
    5. amount
    6. began
    7. regulate
    8. haven't
    9. Thomas
    10. collection
    11. omitted
    12. referred
    13. business
    14. letter
    15. gentlemen
    16. service
    17. manager
    18. department
    19. program
    20. attention
    21. separate
    22. appreciate
    23. graduation
    24. dependable
    25. unwilling

7. You are given a letter that is already prepared for mailing with the exception of the signature. Your boss would like two carbon copies typed of this letter.

8. You will be checked on the care of your work station. To meet this competency, when you are ready, notify the teacher in charge and you will be rated according to a checklist. You may see the checklist prior to being rated.

9. From the mailing list attached, prepare 5" x 3" cards for each individual on the list. The names should be typed in this order: last name, first name, and middle initial with titles like Dr. in parentheses. The typing should be three lines from the top of the card and one-half inch from the left edge of the card.

At this time you will type the message and the address on a postal card to the first five people on the list.

Mailing List

1. Dr. Lois A. Callahan
College of San Mateo
1700 W. Hillsdale Boulevard
San Mateo, CA 94402 Personal*

2. Joe Bouchard
Yuba City High School
850 B Street
Yuba City, CA 95991 Registered*

3. Charles E. Buckton
Redwood High School
1001 W. Main Street
Visalia, CA 93277

4. Tom Clark
Trinity High School
P. O. Box 1060
Weaverville, CA 96093

5. Mrs. Kay L. Cosby
ABC Unified School District
12108 East Del Amo
Artesia, CA 90701

6. Mrs. Joan A. Goria
Skyline High School
12250 Skyline Boulevard
Oakland, CA 94619 Insured*

7. Robert D. Harr
Distributive Education-Retail ROP
Del Monte Center
Monterey, CA 93940

8. Mrs. Marty Hays
Sunny Hills High School
1801 Warburton Way
Fullerton, CA 92633

*For use in Test No. 12

9. (continued)

9. Mrs. Fawn Jeffers'
Santa Barbara High School
700 E. Anapamu Street
Santa Barbara, CA 93103

Attention
Business
Department*

10. Robert W. McGinness
Buchser High School
3000 Benton Street
Santa Clara, CA 95051

11. Charles Priest
Regional Training Program
1776 Broadway
Redwood City, CA 94063

12. Terrence F. Rieger
Lassen High School
1110 Main Street
Susanville, CA 96130

Airmail*

13. R. Conway Spitler
Canyon High School
19300 W. Nadal Street
Canyon Country, CA 91351

14. Mrs. June Terzich
Ravenswood High School
2050 Cooley Avenue
East Palo Alto, CA 94303

15. Donald E. Tingley
Aragon High School
900 Alameda de las Pulgas
San Mateo, CA 94402

16. Mrs. Betty Trempe
John Burroughs High School
1920 Clark Avenue
Burbank, CA 91506

17. Mrs. Lynda Veatch
Claremont High School
1601 N. Indian Hill
Claremont, CA 91711

*For use in Test No. 12

9. (continued)

Information for postal card:

Current date

Dear Mr./Mrs. (supply correct Surname)

There will be a reunion of GEM at Fillmore, California,
on July 4, 1974. Swimming, eating, entertainment
beginning at 1 o'clock and going until all want to quit.

Please send a reply by June 26.

Sincerely,

Your leader

rcs

10. Using the address list in the previous problem type an individual mailing label for individuals numbered 6 through 10. Before handing in the labels be certain they are placed in alphabetic order.

Using the address list in the previous problem type continuous labels to be placed on individual file folder for all individuals on the list.

11. You will be given a letter as a source material in draft form. From this draft you are to type the letter with the date and closing lines at the center point and mixed/standard punctuation. Be certain that the letter is typed in transmittable form.

11. (Substitute)
You will be given a memorandum as a source material in draft form. From this draft you are to type the memorandum on the specified form making the copy(s) transmittable.

12. From the mailing list used in test (9), address the large-sized envelopes to the individuals who are assigned odd numbers. The small-sized envelopes are addressed to the even numbered individuals. Do not forget any special notations which should appear on the envelopes. Before returning the addressed envelopes, please place them in alphabetical order and place a rubber band around them.

13. You are requested to type a letter which requires an enclosure. The enclosure will be given to you. You will be tested separately on how you handled the enclosure and how you type the letter.

14. Another request is made of you to type a letter with two carbon copies and address an envelope. All work will be in transmittable form. You will be evaluated on how you have arranged the letter and the envelope and production of the typed material.

14. (alternate)
Another request is made of you to type a memorandum with two carbon copies and an envelope. All work will be in transmittable form. You will be evaluated on how you have arranged the memorandum and the envelope as well as on the production of the typed material.

15. Given the letter and an envelope typed in (14) you will fold the letter and properly insert it in the envelope.

16. Handed an edited rough draft of a two-page manuscript with a footnote, you will type a transmittable copy. You may use a style guide as a reference while typing this manuscript. The style should be: First page, 2" top margin, 1" side margin, and 1" bottom margins with 5-space paragraph indentions. There will be side headings underscored with triple spacing before the headings. The second page will have a 1" top and side margins with the page number in the upper right-hand corner and the footnote at the end of the manuscript. The final result will be a transmittable copy.

17. Given the information below, please type a purchase order with one carbon copy.

GEM DISTRIBUTORS, P. O. Box 521, Fillmore, CA 93015 is sending a purchase order No. 4438-B to: Lynda's Music Center, 1900 Indian Hill Road, Claremont, CA 91711 with today's date, Ship via: United Parcel Service: 150 MasterRadio portable TVs, RP66, @ 98.75, $14,812.50; 75 MasterRadio AM/FM table radios, F97TR, @ $50.00, $3,750.00; and 35 MusicRadio portable radios, T75V, @ 12.50, $437.50; Subtotal $19,000.00; Sales Tax $1,140.00; Grand Total $20,140.00.

18. Use a duplicator masterset and type and draw the title page so that when a copy is run from the master the content is 100% accurate, placement is as specified in the instructions, all corrections should be unnoticeable, should be free of smudges and roller marks, and the copy should be entirely legible.

19. You will be given a one-page source document with the placement instructions. Please type and make corrections on the original copy so that your typed document can be made into a thermal copy meeting the following standards: 100% accurate in content, completely legible, unnoticeable corrections, and placement as specified in the directions.

20. You will be given a one-page source document with the placement instructions. Please type and make corrections on the copy so that a photocopy of the original meets the following criteria: 100% accurate in content, completely legible, corrections not noticeable and placement as specified.

INSTRUCTIONAL CHECKLIST	PASS	REPEAT	PASS	REPEAT
PROCEDURAL STEPS - Typing Transmittable Products				
1. Teach correct format, centering, alignment for typing				
a. Letters				
b. Forms				
c. Memos				
d. Reports				
e. Stencils or masters				
f. Carbon copies				
2. General requirements All products must be:				
a. Neat				
b. Clear				
c. Correct				
d. Centered on page				
e. Aligned on page				
f. Free of errors and misspelled words				
g. Complete - no information omitted				
3. General procedures				
a. Place paper and/or carbon sets in typewriter				
b. Align papers				
c. Set margins				
d. Type content				
4. Letters and memoranda				
a. Format				
b. Content				
- Date				
- Addressee				
- Salutation				
- Text--complete and identical to that contained in source document				
- Closing				
- Signature				
- Notation of enclosures or carbon copies, if appropriate				

INSTRUCTIONAL CHECKLIST (continued)	PASS	REPEAT	PASS	REPEAT
5. Forms a. Format - appropriate to form				
b. Content - complete and identical to that contained in source document				
6. Straight copy reports a. Format--as instructed				
- Headings				
- Page numbering				
b. Content--complete and identical to that contained on the source document				
7. Reproduction masters Prepare in accordance with: a. General requirements				
b. Specific manufacturer's instructions for use of the master: - Typing pressure				
- Erasures or corrections				
8. Proofreading a. With another person, read content				
Typist reads finished product				
Other person reads source document				
b. If proofreading alone, check finished product word-for-word against original document				
c. Make corrections as necessary				
d. If document is retyped to correct, check retyped material against the source document				

Note to teacher: None

Materials needed:

Plain white paper

1. The following letter has not been divided into paragraphs. Please paragraph the letter into logical units.

> Dear Sir: I would like to order one Model #A1420 flat file drawer. The catalog I have is not the current issue; therefore, I am not sure of the present price of the file drawer. Please include your bill with the shipment. The business department will be presenting an inservice program for teachers at our school on Friday, March 19, and I would like to have the file drawer at least two weeks prior to this date. Sincerely yours,

2. Please punctuate the following ten compound sentences.

    1. Mr. Spitler understands individualized typing therefore he has a good basis for helping others to understand the concept.

    2. Claremont High School appreciated your request for learning activity packages but we are unable to give anymore away at this time.

    3. The value of money has decreased the cost of living has increased.

    4. Many schools have a selection of up-to-date reference books for example a ZIP Code Directory Roget's Thesaurus World Atlas World Almanac office personnel reference manuals and others.

    5. She must borrow a car otherwise she cannot go to the movie

    6. The group wanted to go to the rodeo however it was raining

    7. Your representative Gary Wills promised to send me a sample of your new accounting textbook a workbook an answer key and a teacher's manual but the textbook is all I have received.

    8. Either you change your clothes or you will stay home.

    9. I called the bank about an error in my bank statement however the error was in my calculations.

    10. Because the extra money for the cleaning deposit was not expected Mr. and Mrs Reiger did not rent today but they will be back tomorrow with the rent plus the deposit.

(Answer Sheet)

1. Dear Sir:

   I would like to order one Model #A1420 flat file drawer.

   The catalog I have is not the current one; therefore, I am not sure of the present price of the file drawer. Please include your bill with the shipment.

   The business department will be presenting an inservice program for teachers at our school on Friday, March 19. I would like to have the file drawer at least two weeks prior to this date.

   Sincerely yours,

2. 1. Mr. Spitler understands individualized typing; therefore, he has a good basis for helping others to understand the concept.

   2. Claremont High School appreciated your request for learning activity packages, but we are unable to give anymore away at this time.

   3. The value of money has decreased; the cost of living has increased.

   4. Many schools have a selection of up-to-date reference books; for example, a ZIP Code Directory, Roget's Thesuarus, World Atlas, World Almanac, office personnel reference manuals, and others.

   5. She must borrow a car; otherwise, she cannot go to the movie.

   6. The group wanted to go to the rodeo; however, it was raining.

   7. Your representative, Gary Wills, promised to send me a sample of your new accounting textbook, a workbook, an answer key, and a teacher's manual; but the textbook is all I have received.

   8. Either you change your clothes, or you will stay home.

   9. I called the bank about an error in my bank statement; however, the error was in my calculations.

   10. Because the extra money for the cleaning deposit was not expected, Mr. and Mrs. Reiger did not rent today, but they will be back tomorrow with the rent plus the deposit.

Note to teacher:

Listed are suggested problems.

Materials needed:

1. Forms as indicated for each problem
2. Test
3. Answer sheet

Please total the deposit ticket.

DEPOSIT TICKET

	Dollars	Cents
Currency	129	33
Coin	39	07
Checks		
1 90-03	23	19
2 1-65	295	58
3 65-103	141	90
4 90-03	20	80
5 90-03	3	45
6 90-03	10	62
7 90-03	75	14
8 91-05	15	80
9 91-05	79	67
10 91-05	1	21
11		
12		
TOTAL		

Please enter the total amount of deposit on the front of this ticket

DEPOSIT TICKET

Date_______________19___

Total Deposit

$

Please list all items on the back of this ticket or attach list and enter total in this box

BANK

Please total the deposit slips and place the totals in the spaces provided.

For Deposit to the Account of

Date__________________ 19___

____
Cash received from deposit ➡

BANK

CASH	Currency	82	00
	Coin	9	89
CHECKS	91-62	29	03
	90-38	7	00
Total from other side			
TOTAL			
Less cash received			
NET DEPOSIT			

Use other side for additional listing

Be sure each item is properly endorsed

For Deposit to the Account of

Date__________________ 19___

____
Cash received from deposit ➡

BANK

CASH	Currency	90	00
	Coin	25	13
CHECKS	1-63	7	85
	90-35	110	08
Total from other side			
TOTAL			
Less cash received			
NET DEPOSIT			

Use other side for additional listing

Be sure each item is properly endorsed

Using the old balance as the starting amount compute the balance on the check stubs.

No. A $ 1.04
Sept. 19 19 64
To Handy Labels
For

	DOLLARS	CENTS
Old Balance	253	72
Deposited		
Total		
This Check	1	04
Check Charge		
New Balance		

No. C $ 118.00
Sept. 24 19 64
To Am. Orchid Society
For Due Jan. 1965

	DOLLARS	CENTS
Old Balance		
Deposited		
Total		
This Check	118	00
Check Charge		
New Balance		

No. B $ 1.25
Sept. 23 19 64
To Supt. of Documents
For Stamp Book

	DOLLARS	CENTS
Old Balance		
Deposited	386	25
Total		
This Check	1	25
Check Charge		
New Balance		

No. D $ 27.22
Sept. 27 19 64
To Centre Coin Co.
13831 Ventura Blvd.
For Sherman Oaks 4

	DOLLARS	CENTS
Old Balance		
Deposited		
Total		
This Check	27	22
Check Charge		
New Balance		

Please find the total wages and then the grand total.

TIME CARD
Employee #_______

	Hours	Rate Per Hour	Total Wages
Oct. 3	8	1.65	
4	8	1.65	
5	6	1.65	
6	4	1.65	
7	5	1.65	
Grand Totals			

Please find the totals or subtotals of each cash register receipt.

6 JULY 73

$000.39
$000.75
$000.07 TX

$ TL

7 JUL 1973

$000.40
$000.39
$000.05 TX

$ TL

JUN 26 1973

$000.30
$001.29
$000.30
$000.20
$000.10 TAX

$ TOTL.

Please extend the items, subtotal, then compute the sales tax and then find total amount due.

INVOICE

Sample Company
Anywhere
U.S.A.

Gem, Inc.
P. O. Box 521
Fillmore, CA 93015

15	ea	Suits, Skindivers	$ 63.50	
63	ea	Snorkels	4.98	
		Subtotal		
		Sales Tax 6%		
		Total		

Please reconcile the checking account.

Reconciling Bank Statement

Bank Balance	$ 342.50	Checkbook Balance	$377.98
Add:		Subtract:	
Deposit not recorded	75.30	Service Charge	3.59
Subtract: Outstanding checks			
#115	16.23		
#116	20.00		
Total	$	Total	$

Please find balance for August, September, and October.

GEM, Inc.

Date			Debit	Credit	Balance
July 10	100	Orchid Plants	318.00		318.00
Aug. 10		Payment		15.00	
Sept. 10		Payment		15.00	
Oct. 10		Payment		15.00	

Take the various forms involving addition, subtraction, and multiplication and find the correct answers using the touch system at a rate of 100 strokes per minute.

GEM, Inc.

Sales for week of ____________

Salesman	Mon.	Tue.	Wed.	Thur.	Fri.	Total
Smith, J.	12	10	8	7	23	
Smith, K.	14	10	18	20	18	
Smith, R.	10	8	7	20	13	
Smith, S.	18	18	18	18	18	
Smith, T.	10	20	30	10	25	
			Grand Total			

Petty Cash Record

Date 1973	Description	Voucher No.	Total Amount
Dec. 5	Amount Forwarded		14.23
6	5" x 3" Cards		1.29
6	Ribbons		2.73
7	Scissors		3.98
8	Envelopes		.98

Please find the total amount due to replenish the Petty Cash Fund.

Please compute the on hand amounts for each date.

GEM, Inc.

Date	Description	Received	Issued	On Hand
July 1	Bolt, 1 x 3/8"			176
July 3			130	
July 5			40	
July 6		144		
July 7			128	
July 8			18	

Please compute the following problems using the touch system.

Please find the ending balance from the checkbook stubs.

No. K $ 152.20
Oct. 26 19 64
To Fillmore Drug Co.
For

	DOLLARS	CENTS
Old Balance	198	38
Deposited		
Total		
This Check	152	20
Check Charge		
New Balance		

No. M $ 416.85
Oct. 30 19 64
To Pacific Delivery
For

	DOLLARS	CENTS
Old Balance		
10-31 Deposited	335	80
Total		
This Check	416	85
Check Charge		
New Balance		

No. L $ 310.00
Oct. 3 19 64
To M. V. Sputer
For

	DOLLARS	CENTS
Old Balance		
Deposited	259	59
Total		
This Check	310	00
Check Charge		
New Balance		

Please find the balance.

GEM, Inc.
P.O. Box 521
Fillmore, CA 93015

Mr. John T. Pack
18 70th Street
San Diego, CA 92010

Date: July 8, 1973

Date	Ticket Number	Debit	Credit	Balance
June 20	134	123.17		123.17
21	138		103.22	
22	186		89.27	
23	189		12.32	

Using the conversion table furnished, you convert the fractions to decimals and compute the answers using the correct fingering.

GEM, Inc.				
5	ea	#173	.05 1/2	
13	ea	#832	.12 1/8	
10	ea	#128	.07 1/3	
		Subtotal		
		Sales Tax 6%		
		Total		

GEM, Inc.				
1	dz	Eggs	@ .30 1/6	
2	dz	Eggs	@ .43 1/2	
		Subtotal		
		Sales Tax 6%		
		Total		

Please extend the figures, compute the sales tax and then total amount.

GEM, Inc.

#2317890

Sold To: J. W. Smith

Item	Quantity	Price	Amount
Gas	13.8 gals.	@ .36 9/10	
Oil	1 qt.	@ .95	
	Subtotal		
Sales Tax Included			
	Total		

To find the decimal equivalent of a fraction:

Numbers in the heading of the table are numerators (upper number in a fraction).

$\underline{5}$ numerator

Numbers in the left column are denominators (lower number in a fraction).

$\overline{8}$

To find the decimal equivalent of 5/8, locate the 5 in the numerator heading of the table. Look down the numerator column to where 5 intersects with 8 in the denominator column. The equivalent of 5/8 is .625.

DECIMAL EQUIVALENTS OF FRACTIONS

	NUMERATORS							
	$\underline{1}$	$\underline{2}$	$\underline{3}$	$\underline{4}$	$\underline{5}$	$\underline{6}$	$\underline{7}$	$\underline{8}$
$\overline{2}$	.5							
$\overline{3}$	.3333	.6667						
$\overline{4}$	.25	.5	.75					
$\overline{5}$	.2	.4	.6	.8				
$\overline{6}$	.1667	.3333	.5	.6667	.8333			
$\overline{7}$	.1429	.2857	.4386	.5714	.7143	.8571		
$\overline{8}$	.125	.25	.375	.5	.625	.75	.875	
$\overline{9}$	.1111	.2222	.3333	.4444	.5556	.6667	.7778	.8889
$\overline{10}$	.1	.2	.3	.4	.5	.6	.7	.8
$\overline{11}$	.0909	.1818	.2727	.3636	.4545	.5555	.6364	.7273
$\overline{12}$	.0833	.1667	.25	.3333	.4167	.5	.5333	.6667

Please compute the answers to the following problems using the correct fingering, determining the decimal placement and round off the answer to the nearest hundredth.

Please extend to find the amount and then total.

GEM, Inc.
Invoice

Quantity	Stock No.	Description	Unit Price	Amount
4	C-4	Ring	68.10	
10	D-8	Ring	23.48	
8	E-1	Ring	53.20	
6	F-01	Ring	108.23	
		Total		

GEM, Inc.
Inventory

_______________ Total Value

Stock No.	No.	Cost	Amount
1083	38	1.375	
1084	45	2.832	
1085	30	.075	
1086	45	1.893	

Please extend to find the amount and then total.

Please find the hours, the amount due, and total.

GEM, Inc.
Hours
Rate $1.895

Date	Hours In	Hours Out	Hours Hours	Amount Amount
July 1	08:13	12:13		
2	08:01	12:05		
3	08:00	12:00		
	Total			

Please compute the answers using the touch system determining the decimal placement and round off to the nearest hundredth.

Please find average amount for total.

Date	Receipts	Number of Employees	Amount each Employee
	42.38	6	7.063
	104.67	16	6.537
	23.67	4	5.917
Total	170.72	26	

Find percentage of hits.

Name	Times at Bat	Hits	%
James	51	20	
Simms	23	18	
Boyd	48	18	

Please find percent of total sales for West, South and North.

Sales Department

Report of Sales for______________

Sales	Territory	% Total Sales
125	West	
185	South	
203	North	
513	-	100%

Please find percentage of increase and decrease of sales listed.

Sales		Increase		Decrease	
Last Year	This Year	Amount	%	Amount	%
235.00	265.00	+30.00			
320.00	280.00			-40.00	

Compute the answers to the following problems.

GEM, Inc.				
Number	Unit	Description	Cost	Amount
5	ea	Pencils	.03 1/8	
5.8	dz	Erasers	.075	
12	ea	Pens	.27 1/4	
		Subtotal		
		Tax 6%		
		Total		

GEM, Inc.				
Number	Unit	Description	Cost	Amount
15	dz	Balls, golf, #132-1	3.084	
10	ea	Bags, golf #36	9.23	
5	ea	Covers, club	.28 1/4	
		Subtotal		
		Tax 6%		
		Total		

Note to teacher:

It might be well to have a file drawer with folders, guides, etc. for all alphabetic problems. In this way, less items will be necessary.

Materials needed:

1. 30 documents (alphabetic), file folders
2. 15 documents (numeric), file folders
3. 15 documents (subject), file folders
4. 15 documents (geographic), file folders
5. 15 documents (follow-up)
6. 10 requests for retrieving file folders, files, check out form
7. 10 uncoded documents, procedure for coding
8. 10 documents needing cross-referencing, cross-reference sheet, file
9. 10 documents, file folders
10. 1 request for copy of filed document, copy paper
11. 5 requests (removal of documents), file, check out record form
12. Request for information, file, abstract form

1. You are given 30 documents requiring alphabetic filing with file folders. Please place all documents alphabetically in chronological order within the file within 40 minutes, with at least 90% accuracy.

2. You are given 15 documents requiring numeric filing and file folders. Please file all documents numerically and in chronological order within the file with no more than two items out of place, within 20 minutes.

3. You are given 15 documents requiring subject filing and file folders. You will file all documents by subject and in chronological order within the files with no more than two items out of place, within 20 minutes.

4. You are given 15 documents requiring geographic filing and file folders. You will file all documents geographically and in chronological order within each folder with no more than two items out of place, within 20 minutes.

5. Having 15 documents requiring follow-up action, you will arrange all documents in chronological order with no more than two items out of place, within an eight (8) minute period.

6. Given 10 requests for retrieving file folders, you will retrieve the files requested and record the removal with 90% accuracy, within a time limit of 15 minutes.

7. Given 10 uncoded documents and the procedure for coding, please code the documents with 90% accuracy, within a time limit of 20 minutes.

8. Given 10 documents to be corss-referenced, cross-referencing sheets, and file folders, you will complete the cross-referencing sheets, file the documents and cross-reference sheets with 90% accuracy within a time limit of 30 minutes.

9. Given 10 documents, new file folders, index cards, and cross-index cards, you will make new folders and cards for the documents with 90% accuracy within a time limit of 20 minutes.

10. You are requested to make a copy of a file document. Please find and remove the document from the file, provide a copy by using a copying machine.

11. You are requested to remove five documents from the file area. Please complete the check out record for each document within a 10 minute time limit.

12. Given a request for information contained in filed documents, you will find the document and will abstract the requested information from the file within 15 minutes with 100% accuracy.

Note to teacher:

1. Prepare 10 pieces of mail of different weight and class.
2. Provide postage scale.
3. Provide postage rate chart (can be obtained from the post office).
4. Provide a box to be wrapped, wrapping paper, tape, and string.
5. Prepare 20 pieces of "specialized mail" (see objective 303.01.05 for definition of "specialized mail").
6. Provide ten blank envelopes and a ZIP Code Directory.
7. Provide 50 blank envelopes.
8. Provide 100 blank envelopes with the following markings:
    a. 35 envelopes with a red mark in the upper right-hand corner to signify "airmail" mailings
    b. 30 envelopes with a black mark in the upper right-hand corner to signify "local" mailings
    c. 35 envelopes with a blue mark in the upper right-hand corner to signify "out of town" mailings

Materials needed:

1. Ten pieces of mail to identify and determine postage
2. Postage scale
3. Postage chart
4. Box, wrapping paper, tape, and string
5. 20 pieces of "specialized mail"
6. 10 blank envelopes
7. ZIP Code Directory
8. 50 blank envelopes for demonstration
9. 100 coded envelopes

1. You will identify, weigh, and determine postage for each of the ten pieces of mail according to first, second, third or fourth class rates on the postage chart. Place your answers on the lines below.

1.______________ 6.______________

2.______________ 7.______________

3.______________ 8.______________

4.______________ 9.______________

5.______________ 10.______________

2. Using the parcel post chart, determine the cost of sending the parcels listed below.

	WEIGHT	ZONE	POSTAGE
1.	65 lbs.	1	______________
2.	1 lb., 2 oz.	8	______________
3.	49 lbs., 6 oz.	5	______________
4.	31 lbs.	local	______________
5.	2 lbs., 8 oz.	3	______________
6.	5 lbs., 10 oz.	6	______________
7.	37 lbs., 1 oz.	2	______________
8.	16 lbs., 4 oz.	7	______________
9.	18 lbs.	3	______________
10.	50 lbs., 11 oz.	8	______________

3. Please place a check mark on the blank line next to the item that may be mailed with "special fourth" class rate. Below is a list of packages containing the following articles:

1. School textbook ________
2. Clothing ________
3. Printed objective tests ________
4. Cookies and candy ________
5. Music ________
6. Jewelry ________
7. Candle ________
8. Doll ________
9. Manuscript ________
10. Chair ________
11. Yarn ________
12. 16mm films ________
13. Box of stationery ________
14. Library book ________
15. Box of pencils ________
16. Cosmetics ________
17. Library film catalog ________
18. Gun ________
19. Loose-leaf pamphlet of medical information ________
20. Sound recording ________

4. Please wrap, seal, weigh, and determine the postage for the box provided by the teacher.

Postage______________

5. You will use the postage scale and mail chart to determine the postage of the 20 pieces of "specialized" mail. Write the postage rate on the blank lines below.

1.______________
2.______________
3.______________
4.______________
5.______________
6.______________
7.______________
8.______________
9.______________
10.______________
11.______________
12.______________
13.______________
14.______________
15.______________
16.______________
17.______________
18.______________
19.______________
20.______________

6. You will address the ten envelopes to the following people. Use the ZIP Code Directory to determine ZIP codes.

1. Dr. Robert Hays
College of San Mateo
1987 East Hillsdale Boulevard
San Mateo, CA

2. Miss Fawn Cosby
Distributive Education
Del Monte Center
Santa Barbara, CA

3. Mr. Conway Tingley
815 North Noble
Watonga, Oklahoma

4. Mr. Charles Goria
Skyline High School
1004 East Main Street
Yuba City, CA

5. Mr. Bob Spitler
2050 Belford Way
San Mateo, CA

6. Ms. Lynda Terzich
Upland Beauth Supply
311 Grove Street
Upland, CA

7. Mrs. June Trempe
House of Beauty
2525 Tyrone Avenue
Springfield, MA

8. Mrs. Betty Reiger
Rieger's Travel Agency
9187 South Barey
Baker, Florida

9. Mr. Tom Aikin
State Department of Education
233 Cardinal Drive
Albany, GA

10. Mrs. Claire Callahan
House of Fashions
6565 West Chavez Avenue
Burbank, CA

7. Please demonstrate the correct method of preparing to seal the 50 envelopes given to you.

   Please demonstrate the correct method of preparing to stamp by hand the 50 envelopes given to you.

8. Use the 100 envelopes given to you by your teacher. The red mark in the upper right-hand corner signified "airmail" mailings. The black mark in the upper right-hand corner signifies "local" mailings. The blue mark in the upper right-hand corner signifies "out of town" mailings.

   Please arrange, bundle, stack and tie the envelopes in the appropriate quantity for mailing.

Note to Teacher:

1. Prepare 10 questions to use with standard secretarial handbook.
2. Prepare five requests for information from an almanac.
3. List of three cities to find information about motels and hotels.
4. Prepare five words for finding synonyms for these words using thesaurus.
5. Prepare a list of cities to find population, square miles, state, and elevation in an atlas.

Materials Needed:

1. Ten questions, standard secretarial handbook, answer sheet
2. Five requests for information, almanac, answer sheet
3. Three cities, hotel-motel directory, answer sheet
4. Five words, thesaurus, answer sheet
5. List of cities, atlas, answer sheet

1. Using the Standard Secretarial Handbook, find the answers to the 10 questions listed below. When you have found the answers, please list the page number on which the information was found on the answer sheet.

    1. Which is preferred? "all-round" or "all-around"
    2. What does whoever mean?
    3. Correct usage of come and go.
    4. Biblical words denoting the Deity are capitalized or not capitalized?
    5. The correct pronunciation of ultimatum?
    6. Difference between guarantee and guaranty.
    7. Do you place commas around single when you wish to make it emphatic?
    8. Do I place quotes around a common foreign word?
    9. How do I address a formal writing to a church man?
    10. What may be mailed in bulk?

2. Using an almanac, please write the answers on the answer sheet to the following questions:

    1. What is the highest major public dam in the United States? In what state is it located; what is its height, and what river does it dam?
    2. In crossword puzzle guide, what is the word for pagoda?
    3. In Lisbon in what year was one of the greatest earthquakes?
    4. Who was the thirteenth President of the United States?
    5. What is the area of California?
    6. On what day of the week will July 4, 1980, fall?
    7. When was Clark Gable, the celebrated movie star, born?
    8. What can you tell about Tunisia?
    9. What are the legal holidays in the fifty states?

3. Using a hotel-motel directory, list the name, address, telephone number, and rates for two motels or hotels in each of the cities listed:

    Eureka, CA
    Santa Barbara, CA
    Squaw Valley, CA

4. Using the thesaurus, please write three synonyms for each of the words given to you:

   1. business
   2. profit
   3. capital
   4. questionnaire
   5. personality

5. Given an atlas, using the atlas, please list the population, square miles, and capital of the countries given you:

Country	Capital	Population	Square Miles
Scotland			
Luxembourg			
Vatican City State			
Austria			
United Kingdom			

Note to teacher: None.

Materials needed:

1. Source documents, deposit form, single-entry cash receipts journal and checks
2. Completed cash sales slips, credit sales slips, cash register tape, credit memos, journal form, and summary report form
3. Instructions for time cards, payroll summary sheets, payroll vouchers, tax charts (Federal and State)
4. *Stock records, invoices, bills of lading, stock and inventory cards
5. *Stock records, requisitions, purchase orders, stock and inventory cards

*It is suggested the same records be used for numbers 4 and 5.

1. Given source documents, please verify amounts received, endorse the checks properly, complete the deposit form and record the essential information in a single-entry journal. All this to be done accurately.

TALLEY SHEET		
Currency		
3 - $10 bills	30^{00}	
10 - $5 bills	50^{00}	
93 - $1 bills	93^{00}	
Total Currency		173.00
Coins		
1 roll of half dollars	10^{00}	
2 rolls of quarters	20^{00}	
12 - 25¢	3^{00}	
12 - 10¢	1^{20}	
25 - 5¢	1^{25}	
98 - 1¢	.98	
Total Coins		36.43
TOTAL CASH TO BE DEPOSITED		209.43

FOR DEPOSIT TO THE ACCOUNT OF

John, John Inc.

DATE ______________ 19 ____

CASH RECEIVED FROM DEPOSIT

SACRAMENTO MAIN OFFICE
THE BANK OF CALIFORNIA N.A.
1010 8TH ST., SACRAMENTO, CA. 95805

⑆1211⑈1944⑆

CHECKS AND OTHER ITEMS ARE RECEIVED FOR DEPOSIT SUBJECT TO THE TERMS AND CONDITIONS OF THIS BANK'S COLLECTION AGREEMENT

CASH	CURRENCY		
	COIN		
CHECKS			
TOTAL FROM OTHER SIDE			
TOTAL			
LESS CASH RECEIVED			
NET DEPOSIT			

90-1944
1211

USE OTHER SIDE FOR ADDITIONAL LISTING

BE SURE EACH ITEM IS PROPERLY ENDORSED

DEPOSIT TICKET

PLEASE BE SURE THAT ALL ITEMS ARE PROPERLY ENDORSED LIST EACH CHECK SEPARATELY

CHECKS PROPERLY ENDORSED LIST EACH SEPARATELY	DOLLARS	CENTS
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		
22		
TOTAL		

PLEASE ENTER THE TOTAL AMOUNT OF DEPOSIT ON THE FRONT OF THIS TICKET

CASH RECEIPTS JOURNAL

Date	Customer's Name	Explanation	Post Ref.	Amount
1973				

GEM, Inc. No. 103

July 1, 1973 $\frac{90\text{-}30}{1211}$

Pay to the Order of Cash $\$157^{13}$

One-Hundred-Fifty Seven and $\frac{13}{100}$ — Dollars

Union City Bank
City, State

Noynoc, Inc. No. 1001

July 4, 1973 $\frac{91\text{-}24}{1211}$

Pay to the Order of John John Inc. $\$10\frac{00}{xx}$

Ten and $\frac{20}{100}$ — Dollars

City Farmers' Bank
City, State

TNOMERALC, Ltc. No. 736

July 1, 1973 $\frac{90\text{-}25}{1011}$

Pay to the Order of Cash $\$3^{29}$

Three and $\frac{29}{100}$ — Dollars

Bank of N.Y.
N.Y., NY

NESSAL & SONS, Inc. No. 475

July 2, 1973 $\frac{90\text{-}23}{1211}$

Pay to the Order of John, John Inc. $\$16^{23}$

Sixteen and $\frac{23}{100}$ — Dollars

City Bank
City, State

Ailosiv No. 958

July 3, 1973 $\frac{90\text{-}30}{1211}$

Pay to the Order of Cash $\$125^{00}$

One-Hundred-Twenty-Five and $\frac{00}{100}$ — Dollars

Union City Bank
City, State

OETAM, Inc. No. 12

July 2, 1973 $\frac{90\text{-}23}{1111}$

Pay to the Order of John John Inc. $\$8^{24}$

Eight and $\frac{24}{100}$ — Dollars

City Bank
City, State

2. Given completed cash sales slips, credit sales slips, cash register tape, credit memorandums, and journal form, you will verify computations, record data in the journal and total and/or balance the journal. After completing the work, please prepare a summary report with 90% accuracy.

GEM, Inc.
P.O. Box 501
Anacat, CA 93015

August 30, 1973

To: John Allen
198-23-873

QUAN	UNIT	DESCRIPTION	AMOUNT
3	ea.	Kol-Labels Canary @ 1.23	3.69
10	rms.	Paper, Mimeo Canary @ .69	6.90
		Subtotal	10.59
		Tax 6%	.64
		Total	11.23

GEM, Inc.
P.O. Box 501
Anacat, CA 93015

August 30, 1973

To: J. J. Joy
103-23-198

QUAN	UNIT	DESCRIPTION	AMOUNT
2	dz.	P2040.7 Pens $1.62	3.24
10	ea.	P2040.12 Pens $1.43	1.43
		Subtotal	4.67
		Tax 6%	.28
		Total	4.95

GEM, Inc.
P.O. Box 501
Anacat, CA 93015

August 30, 1973

To: Jayson Allen
138-32-894

QUAN	UNIT	DESCRIPTION	AMOUNT
100	ea.	C-30 Cassette Blanks @ .45	45.50
40	ea.	C-60 Cassette Blanks @ .55	22.00
		Subtotal	67.00
		10% Discount	6.70
			60.30
		Sales Tax 6%	3.62
		Total	63.92

GEM, Inc.

August 30, 1973

To: Cash

Sale	18^{30}
Tax	1^{10}
	19.40

GEM, Inc.

August 30, 1973

To: Cash

Cash Sale	123^{99}
Tax	7^{44}
	131.43

GEM, Inc.

August 30, 1973

To: Cash

Stationery	57^{80}
Tax	3^{47}
	61^{27}

CREDIT MEMO

Customer ____________________

Address ____________________

Account # ____________ Date ________

____

Approved By

CREDIT MEMO

Customer ____________________

Address ____________________

Account # ____________ Date ________

____

Approved By

GEM, Inc.

Cash	19.40
Chg	11.23
R.O.A. #12330-2 #138-38-387	93.23
CR #189-24-444	9.58
Cash	131.43
Cash	61.27
R.O.A. #12330-1 #133-33-3435	215.35
Chg	4.95
CR #177-87-333	7.31
R.O.A. #12330-4 #198-23-873	25.00
R.O.A. #12330-3 #133-83-783	28.38
Chg	163.92

Date August 30 1973

Mr. Johnny Johnson

No. 133-35-3433

Reg. No. ___ Clerk ___ ACCOUNT FORWARDED 415 35

1				
2	Rcd on			
3				
4	Acct			
5			215	35
6				
7				
8				
9				
10				
11				
12				
13	2332- 2			
14				
15				

Your account stated to date. If error is found return at once.

Date August 30 1973

Mr. John Allen

No. 198-23-873

Reg. No. ___ Clerk ___ ACCOUNT FORWARDED 300 00

1				
2	Received on		25	00
3	Account			
4				
5				
6				
7				
8				
9				
10				
11				
12				
13	2332- 4			
14				
15				

Your account stated to date. If error is found return at once.

Date August 30 1973

Mrs. John Jones

No. 133-83-783

Reg. No. ___ Clerk ___ ACCOUNT FORWARDED 128 | 38

1				
2				
3	Rec'd on			
4	Account		28	38
5				
6				
7				
8				
9				
10				
11				
12				
13	2332- 3			
14				
15				

Your account stated to date. If error is found return at once.

Date August 30 1973

Mr. John Johnsett

No. 138-38-387

Reg. No. ___ Clerk ___ ACCOUNT FORWARDED 93 | 23

1				
2	Received			
3	on			
4	Account		93	23
5				
6				
7				
8				
9				
10				
11				
12				
13	2332- 1			
14				
15				

Your account stated to date. If error is found return at once.

CASH RECEIPTS JOURNAL

Date	Customer's Name	Explanation	Post Ref.	Amount
1973				

SALES JOURNAL

Sales Invoice Number	Date	Customer's Name	Address	Post Ref.	Amount

SALES RETURNS AND ALLOWANCES JOURNAL

Credit Memo Number	Date	Customer's Name	Explanation	Amount

3. Given instructions for completing time cards, please complete the time cards by computing the wages or salary, deductions, and net pay. After computing these figures, please record the payroll data on the summary sheets and prepare the payroll vouchers.

Instructions for Time Cards:

Employees must start working at 8:00 a.m., go out to lunch at 12:00 noon and return at 1:00 p.m., working until 5:00 p.m. If any employee is 5 minutes late, he get paid as though he came to work at the next quarter hour.

Overtime pay is 1½ times regular rate.

Week Ending August 30, 1973
Employee
No. 011 Rate 2.89
Exemptions 3

Day	In	Out	In	Out	Total
M	8^{00}	12^{01}	1^{00}	5^{02}	
T	8^{00}	12^{02}	12^{56}	5^{00}	
W	8^{00}	12^{01}	12^{59}	6^{10}	
Th	8^{00}	12^{03}	12^{58}	5^{01}	
F	8^{00}	12^{00}	12^{58}	5^{01}	

Total ________ Hours

Week Ending August 30, 1973
Employee
No. 014 Rate 3.04
Exemptions 3

Day	In	Out	In	Out	Total
M	8^{01}	12^{01}	1^{00}	5^{02}	
T	8^{02}	12^{03}	12^{55}	5^{00}	
W	8^{03}	12^{04}	12^{56}	5^{03}	
Th	8^{01}	12^{05}	12^{57}	6^{05}	
F	8^{01}	12^{06}	12^{58}	5^{10}	

Total ________ Hours

Week Ending August 30, 1973
Employee
No. 017 Rate 4.25
Exemptions 3

Day	In	Out	In	Out	Total
M	8^{01}	12^{01}	1^{00}	6^{02}	
T	8^{02}	12^{02}	1^{00}	5^{03}	
W	8^{04}	12^{03}	1^{00}	6^{05}	
Th	8^{05}	12^{04}	1^{00}	5^{07}	
F	8^{10}	12^{05}	1^{00}	5^{05}	

Total ________ Hours

Week Ending August 30, 1973
Employee
No. 018 Rate 5.20
Exemptions 3

Day	In	Out	In	Out	Total
M	8^{01}	12^{01}	1^{01}	5^{01}	
T	8^{02}	12^{02}	1^{02}	5^{02}	
W	8^{01}	12^{01}	1^{01}	6^{01}	
Th	8^{01}	12^{01}	1^{01}	5^{01}	
F	8^{00}	12^{00}	1^{00}	5^{00}	

Total ________ Hours

Week Ending
Employee
No. Rate
Exemptions

Day	In	Out	In	Out	Total
M	8^{01}	12^{01}	1^{01}	5^{01}	
T	8^{00}	12^{00}	1^{00}	5^{00}	
W	8^{03}	12^{03}	1^{03}	5^{03}	
Th	8^{02}	12^{02}	1^{02}	6^{02}	
F	8^{00}	12^{00}	1^{00}	5^{00}	

Total ________ Hours

Week Ending
Employee
No. Rate
Exemptions

Day	In	Out	In	Out	Total
M					
T					
W					
Th					
F					

Total ________ Hours

DEDUCTIONS				
Employee #	Dues	Medical	Other	Total
011	6.00	9.21	1.00	
012	6.00	3.50		
013	6.00	13.21		
014	6.00	9.21		
015	6.00	3.50	3.50	
016	6.00	3.50		
017	6.00	9.21		
018	6.00	9.21	2.50	
019	6.00	13.21		

NEED FEDERAL AND STATE

EXEMPTION CHARTS

WEEK ENDING ______________________

Employee Number	Name of Employee	No. of Exemp-tions	Total Hours Worked	Regular Rate of Pay (40 hrs)	Earnings at Regular Rate	Over-time Hours	Over-time Rate	Earn-ings Over-time	Total Wages	Deductions							Net Pay
										FICA	Fed. With Tax	State With. Tax	Dues	Med	Other	Total Ded.	

WEEK ENDING ______________________

Emp. No.	Name of Employee	Hours Worked					Sub-Total Hours Worked	Hours Over-time	Total Hours Worked	Rate per Hour	Earnings at Regular Rate for Total Hours Worked	Over-time Pay	Total Wages
		M	T	W	Th	F							

Payroll Voucher(s)

GEM, Inc.

__________ 19___

Pay to
Order of ______________________________ $__________

____ Dollars

____

- -

Payroll Voucher
Wages for ______________________

Gross
Fed. Tax
State Tax
Dues
Medical
Other
Net Pay

GEM, Inc.

__________ 19___

Pay to
Order of ______________________________ $__________

____ Dollars

____

Void in two years

- -

Week of	Federal	State	Dues	Medical	Other	Net Pay

4. Given incoming stock records, invoices, bills of lading and stock and inventory cards, you will verify data, record the information on stock and inventory cards, balancing information on the form with 100% accuracy on calculations.

STOCK RECORD CARD

Item Reinforcements, gummed Maximum 100
Stock No. R 2060.01 Minimum 30
Unit 100/Box

Date	Quantity Received	Quantity Issued	Balance
July 1, 1973			70
July 3, 1973		30	40
July 5, 1973		20	20

STOCK RECORD CARD

Item Rubber Bands, assorted Maximum 250
Stock No. R 2065.01 Minimum 50
Unit Box

Date	Quantity Received	Quantity Issued	Balance
July 1, 1973			70
July 3, 1973		30	40

STOCK RECORD CARD

Item Sheet Protectors Plastic 8½ x 11" Maximum 1,000
Stock No. S 2080.01 Minimum 100
Unit each

Date	Quantity Received	Quantity Issued	Balance
July 1, 1973			900
July 3, 1973		200	700
July 5, 1973		500	200
July 6, 1973		150	50

STOCK RECORD CARD

Item Punch Three hole, heavy duty Maximum 10
Stock No. P 2055.02 Minimum 5
Unit each

Date	Quantity Received	Quantity Issued	Balance
July 1, 1973			10

GEM, Inc.

P.O. Box 521

Fillmore, CA 93015

Noynac, Inc.
1900 W. White St.
Canyon County, CA 91351

Terms: 2/10, n/30

Date: July 5, 1973

Customer No. 135

Shipped by: UPS

Number	Unit	Description	Amount	Total
80	Box	Reinforcements, gummed	.075	4.00
200	Box	Rubber Bands, assorted	.24	48.00
950	ea	Sheet Protectors, Plastic 8½ X 11"	.0259	24.61
		Subtotal		76.61
		Tax 6%		4.60
		Total		81.21

GEM, Inc.

P.O. Box 521
Fillmore, CA 93015

Doyrac, Inc.
1900 W. White St.
Canyon County, CA 91351

Terms: 2/10, n/30

Date: July 5, 1973

Customer No. 136

Shipped by: UPS

Number	Unit	Description	Amount	Total

GEM, Inc.

P.O. Box 521 Fillmore, CA 93015

Waynac, Inc.
1900 W. White St.
Canyon County, CA 91351
Terms: net 30 days

Date: July 5, 1973
Customer No. 137
Shipped by: UPS

Number	Unit	Description	Amount	Total

GEM, Inc.

P.O. Box 521

Fillmore, CA 93015

Doynac, Inc.
1900 W. White St.
Canyon County, CA 91351

Terms: 2/10,n/30

Date: July 5, 1973

Customer No. 138

Shipped by: UPS

Number	Unit	Description	Amount	Total

5. Given outgoing stock records, requisitions, purchase orders and stock and inventory cards, you will verify and proofread data, complete the invoices, record and balance in proper form with 100% accuracy on calculations.

PURCHASE REQUISITION

No. 19

For Stationery Dept.
Date July 3, 1973

Notify on Delivery A. James
Date Wanted July 10, 1973

Quantity	Description	Remarks
3	Punch, three hole, heavy duty	

Order from

Approved by

NOYNAC, Inc.
P.O. Box 52
Orcata, CA 91320

PURCHASE ORDER

To GEM Inc.
P.O. Box 521
Fillmore, CA 93015

Order # 1301
Date July 5, 1973
Ship Via UPS
Ship to Warehouse
Wanted by July 10, 1973
Terms 2/10, n/30

QUANTITY	DESCRIPTION	UNIT PRICE
5	Punch, three hole, heavy duty	7.26

By

Other Requisitions for:

90 Box Reinforcements, gummed @ .075
150 Box Rubber Bands, assorted @ .24
800 ea Sheet, Protector 8½ X 11" @ .0259

Note to Teacher:

1. Prepare suggested telephone checklist.
2. Prepare suggested test.

Materials Needed:

1. Test
2. Checklist

Situations Requiring the Knowledge of a Switchboard	Types of Calls
1. Establish three night connections and close the board.	Closing the board
2. Open the board and disconnect the night connections.	Opening the board
3. When the trunk lamp lights, answer the incoming calls and establish connection with the proper extension (xample: Extension #1)	Incoming to extension call
4. When the extension lamp lights, answer the extension call with the appropriate phrase and establish the connection with the trunk line. Finish completing your call assuming these situations exist: a. Extension user is holding the line b. Extension user has hung up	Extension to outside calls
5. When the extension lamp lights, answer with an appropriate phrase, establish the connection and ring.	Extension to extension calls
6. You will call an extension number from the switchboard and report that there is a fire in the building.	Switchboard to extension calls
7. You are to place a DDD call to Allied Electronics in San Francisco to order an electrical part for a machine. The phone number is (415) 224-0954. You are in Los Angeles.	Switchboard to outside calls
8. Place a person-to-person call from the switchboard to Jack Jones in San Clemente, California. The phone number is (714) 786-2365.	
9. Call Sacramento (916) 6743 and ask if they will accept a collect call from Burt Cassedy, the president of your company.	
10. You have just received an incoming call through the board and the extension asked for is busy. What procedures do you follow?	Call to "hold"
11. A conference call is requested from an outside caller. He wishes to talk with Mr. "X" on extension 1, Mr. "Y" on extension 2, and Mr. "Z" on extension 3. When you have completed the conference connections, report that all is ready for the conference.	Multiple calls

CHECKLIST FOR SWITCHBOARD	Test 1		Test 2	
	Pass	Repeat	Pass	Repeat
1. Close board a. Cords				
b. Keys (1) Buzzer				
(2) Battery				
(3) Night (if applicable)				
c. Connection card				
2. Open board a. Connection card				
b. Keys (1) Buzzer				
(2) Battery				
(3) Night				
c. Cords				
3. Answering incoming to extension calls a. Trunk key operation				
b. Lever key operation				
c. Cord usage				
d. Ringing the extension				
e. Key usage				
4. Extension to outside calls a. Key usage				
b. Cord usage				
c. Dialing procedure				
5. Extention-to-extension calls a. Key usage				
b. Cord usage				
c. Plug usage				
d. Ringing the extension				
6. Switchboard to extension calls a. Cord usage				
b. Key usage				
c. Ringing extension				

CHECKLIST FOR SWITCHBOARD (continued)	Test 1		Test 2	
	Pass	Repeat	Pass	Repeat
7. Switchboard to outside calls a. Direct Distance Dialing (DDD) (1) Dial code (if applicable)				
(2) Dial area code and telephone number				
b. Reach long distance operator (1) Area code + phone number				
(2) Person-to-person (name of desired party)				
(3) Special instructions (collect)				
(4) Give your telephone number				
8. Calls to "hold" a. Cord usage				
b. Key usage				
c. Permission to place caller on "hold"				
d. Periodic check back with caller				
e. Operation of "hold" button (if applicable)				
9. Multiple calls a. Cord usage				
b. Jack usage				
c. Key usage				

Note to teacher:

It is recommended that a tape be made of the spelling words. The order of dictation might be: dictate the work, use the word in a sentence, and then repeat the word.

WARNING: Do not dictate the words too quickly!

Materials needed:

1. Prepared tape
2. Playback unit
3. Answer sheet(s)
4. Typewriter available

Suggested tape for Spelling - Clerk Typist:

"On this Spelling - Clerk Typist tape, you will be given 100 common business words. The words will be dictated, used in a sentence, and then repeated. You will TYPE the correct spellings on the answer sheet provided after the word has been repeated. Enough time will be given so as to complete the word in typewriting."

CLERK TYPIST SPELLING TEST COMPETENCY 401.03/401.04

1.	perform	Did you perform well?	perform
2.	ancient	The problem was an ancient one.	ancient
3.	accompaniment	The accompaniment was played beautifully.	accompaniment
4.	Wednesday	Wednesday is the middle of the week for some.	Wednesday
5.	assessing	She was assessing the situation.	assessing
6.	definitely	Sue was definitely at the show.	definitely
7.	misspell	June was not going to misspell a word.	misspell
8.	realtor	Terry was not a realtor.	realtor
9.	niece	The niece of Betty was there.	niece
10.	wearied	Lois was wearied by the talk.	wearied
11.	mail order	It was a mail order house.	mail order
12.	transmitting	Charles was transmitting the message.	transmitting
13.	assistant	Tom was an assistant manager.	assistant
14.	disable	He was capable and was able to disable the machine.	disable
15.	entrance	The entrance to the park was colorful.	entrance
16.	hygiene	Personal hygiene is important to all.	hygiene
17.	equalize	Equalize the pressure and all is well.	equalize
18.	wholesale	The office was in the wholesale district.	wholesale
19.	skillful	She was a skillful typist.	skillful
20.	description	The description of the sample was well done.	description
21.	interact	You must interact with others.	interact
22.	jewelry	The jewelry was important to her.	jewelry
23.	different	It was a different color.	different
24.	formally	Kay was formally introduced.	formally
25.	whose	Whose plan was it?	whose
26.	one-price policy	It was a one-price policy store.	one-price policy
27.	enrollment	The enrollment was down.	enrollment
28.	reign	It was dated during the reign of Charles I.	reign
29.	plentiful	It was a country with plentiful food.	plentiful
30.	pricing	The pricing policy was passed.	pricing
31.	grammar	Grammar has always been interesting.	grammar
32.	useful	Typewriting is a useful skill.	useful
33.	category	The category was done incorrectly.	category
34.	self-image	His self-image was poor.	self-image
35.	taped	This dictation is taped.	taped

36.	formerly	Joe was formerly from Idaho.	formerly
37.	aren't	Aren't the figures incorrect?	aren't
38.	believe	You must believe in yourself.	believe
39.	heaviest	This is the heaviest of the packages.	heaviest
40.	eliminating	He was eliminating waste in the office.	eliminating
41.	compelling	The author was compelling with his story.	compelling
42.	parallel	It was a parallel problem.	parallel
43.	hear	Hear what the man has to say.	hear
44.	representative	The representative was in Sacramento.	representative
45.	either	Either he was there or he was not.	either
46.	compliance	He was in compliance with the law.	compliance
47.	licensing	He was licensing the bicycle.	licensing
48.	keenness	The keenness of the group was great.	keenness
49.	balloon	The balloon was flying high.	balloon
50.	speaking	She was speaking to Ethel.	speaking
51.	probably	Probably the math problem was wrong.	probably
52.	advertising	She was advertising the various items.	advertising
53.	council	The city council was meeting.	council
54.	I'm	I'm in the room.	I'm
55.	world-wide	It was world-wide news.	world-wide
56.	neither	Neither of the men would leave.	neither
57.	copying	He was copying the handwriting.	copying
58.	forcing	He was forcing the child to eat.	forcing
59.	transferred	Neil was transferred to another post.	transferred
60.	privilege	It is a privilege to work with the group.	privilege
61.	correspondence	The correspondence was there.	correspondence
62.	partnership	The partnership was dissolved.	partnership
63.	counsel	His counsel was at the jail with him.	counsel
64.	you'll	You'll agree that it was correct.	you'll
65.	one-step	It was the famous one-step.	one-step
66.	height	His height was six feet.	height
67.	chief	The chief was at the dance.	chief
68.	fanciest	It was the fanciest dress there.	fanciest
69.	allies	The allies were at the meeting, too.	allies
70.	trimmings	It was turkey and all the trimmings.	trimmings

71.	laboratory	The laboratory exploded.	laboratory
72.	arrangement	It was a flower arrangement.	arrangement
73.	mathematics	For some, mathematics is difficult.	mathematics
74.	signature	It was his signature on the check.	signature
75.	throw	Throw the food in the garbage.	throw
76.	agent's	The agent's contract was to be re-negotiated.	agent's
77.	old-fashioned	It was an old-fashioned dress.	old-fashioned
78.	eight	It was eight o'clock.	eight
79.	flying	The paper plane was flying.	flying
80.	baking	She was baking the cake.	baking
81.	cleanliness	The cleanliness was noted.	cleanliness
82.	analyze	Analyze your errors in typewriting.	analyze
83.	noiseless	The typewriter was noiseless model.	noiseless
84.	quantity	The quantity of food was abundant.	quantity
85.	broker	The broker was in the sales office.	broker
86.	through	It was through the door.	through
87.	attorneys	The attorneys were in the office.	attorneys
88.	self-respect	It was his self-respect.	self-respect
89.	variety	The variety of meat was remarkable.	variety
90.	carrier	The carrier to the copy machine was broken.	carrier
91.	dining	She was dining in the kitchen.	dining
92.	dweller	She is a city dweller.	dweller
93.	accommodate	She was to accommodate the secretary at the desk.	accommodate
94.	safety	Safety first was the motto.	safety
95.	condemn	"Condemn the man", they cried.	condemn
96.	finally	Finally, the paper arrived for the machine.	finally
97.	blue	The blue color was beautiful with her dress.	blue
98.	year's	The year's end report was done.	year's
99.	co-workers	The co-workers were going to eat together.	co-workers
100.	pier	The pier caught on fire.	pier
	various		
	advisory		
	budgeting		
	normally		
	beautiful		
	accidentally		

CLERK TYPIST SPELLING TEST COMPETENCY 401.03/401.04

Using the list of 25 misspelled words below, **TYPE** the words, spelling them correctly, on the answer sheet provided.

1. sekretary
2. kustomers
3. repourts
4. forwerd
5. aditional
6. divsion
7. subjet
8. recieve
9. rekuest
10. inncome
11. advisse
12. develope
13. shipement
14. beleive
15. offerred
16. tottal
17. suply
18. atached
19. invioce
20. itemns
21. monnths
22. memership
23. effektive
24. encloseing
25. meterial

Note to teacher:

1. Secure timed write paragraphs of approximately 1.5 syllabic intensity.
2. Prepare a tape of oral dictation for the student to typewrite.
3. Transcribing machine, recorded medium, letterheads, etc.
4. Prepare incoming letter, prepare rough draft of reply.
5. Availability of transcribing machine, secure or dictate dictation on a recorded medium.
6. Prepare incoming correspondence requiring written response.
7. Prepare one-page outline in rough draft.
8. Prepare edited rough draft of two-page manuscript with a footnote with instructions.
9. Prepare typed minutes of previous meeting as a guide, prepare handwritten or rough draft of the current meeting.
10. Prepare tabulated data in handwritten rough draft form with instructions.
11. Prepare table of seven or more columns of data with instructions: omit some columns, rearrange others, use open, ruled or boxed form.
12. Secure data as would appear on computer printout, prepare instructions regarding arrangement, form to use.
13. Prepare financial statement in handwritten columnar form. Prepare another financial statement that requires handwritten up-dating.
14. Prepare one-page source document to be typed on a stencil with accompanying instructions.
15. Prepare one-page source document to be typed on a paper master for offset printer. Also prepare instructions.

Materials needed:

1. Paragraphs of syllabic intensity (1.5), sheet of paper
2. Tape or script for oral dictation to typewriter
3. Transcribing machine, recorded medium
4. Incoming letter (copy), prepare rough draft of reply, letterhead (carbon paper if necessary)
5. Transcribing machine, dictation on recorded medium, letterheads (carbon paper if necessary)
6. Prepared incoming piece of correspondence
7. Prepared one-page outline in rough draft with instructions
8. Prepared edited rough draft of two-page manuscript with a footnote, instructions, style guide, paper
9. Prepared typewritten minutes, prepared handwritten or rough draft copy of current meeting, paper
10. Prepared tabulated data in handwritten, rough draft, instructions, paper
11. Prepared table of seven or more columns of data with instructions, paper
12. Prepared data (computer printout), instructions, paper
13. Prepared financial statement with updating, paper, carbon paper
14. Stencil, prepared one-page source document, instructions
15. Master for offset, one-page source document, instructions

Suggested script for tape: (May be shortened)

I enjoyed your program--you certainly have a lively new approach. It is a joy to watch you operate and hear your presentations...because you are involved right now. In other words...WOW! Enjoyed the Program! Thanks.

Your bureau is to be complimented for sponsoring and supporting the demonstration program and your staff members should be thanked for participating. Above all the high school teachers presenting the demonstrations must be recognized for the excellent programs they have at their respective schools, be given acknowledgment of the many out-of-school hours they spent developing school programs and the Demonstration Program, and be given the gratitude of the participants for sharing their expertise.

Business education specifically and vocational education generally, most assuredly will be advanced in the schools of the participants.

EL CAJON VALLEY HIGH SCHOOL
Grossmont Union High School District
1035 Madison Avenue
El Cajon, California 92021

Sample of incoming letter

June 21, 1973

Mrs. Lynda Veatch
Claremont High School
Claremont, CA 91711

Dear Mrs. Veatch:

Your presentation at the extension course dealing with the California Business Education Program Guide was very interesting and well done. After seeing the units you have developed, I would like to take advantage of your offer and obtain some of them. I am interested in the following units:

Personal Development
Handwriting
Reading Instructions
Incoming-Outgoing Mail
Spelling and Word Usage
Business Letters
Working with People

As you suggested when I talked with you, I will be glad to make copies and return the originals to you.

Thank you very much for the opportunity of sharing the ideas you have developed.

Sincerely,
Sharon R. Hamilton
Mrs. Sharon R. Hamilton
ROP Secretarial & Clerical
Business Skills Lab

sw

VOCATIONAL ADVISORY COMMITTEE MEETING
CLAREMONT HIGH SCHOOL
June 7, 1972

Sample minutes of meeting

MEMBERS PRESENT: Betty Spear, Manpower, Inc.; Alex Turner, Chamber of Commerce; Fred Perez, Human Resources Dept., Bud Cox, Bankers Life; Betty Hathaway, Claremont Police Dept.; Kim Parks, Student, Cal Poly; Michele Atkinson, Student, San Diego State; Diane Stowell, Assistant Principal, Claremont High; Billie Walleen, Homemaking Teacher; Harold Cole, Industrial Teacher; Gerry Lininger, Business Teacher; Jim Anderson, Work Experience Coordinator; Lynda Veatch, Vocational Coordinator.

OPENING: Call to Order
Salute to the Flag

INFORMATION: Discussion of the goals, objectives, and purposes of the Claremont Vocational Advisory Committee.

BUSINESS: Organization, procedures and functions of the committee were discussed and members received a print-out covering these areas.

Goals, objectives, and purposes of the Claremont Vocational Admisory Committee were discussed and decided.

Committee members received information and a guided tour of the vocational facilities at the high school.

EDUCATIONAL PROGRAM: The Work Experience Coordinator explained the three types of work experience programs and asked for help from the community in establishing new work stations.

Mrs. Lynda Veatch explained the business program and its goals and objectives.

Mrs. Billie Walleen explained the Food Service Program and Miss Linda Fender discussed the Nursery School Aide Program.

All programs were discussed in terms of goals and objectives for the 1973-74 school year.

1. You will be given several paragraphs from which you will touch type for a period of five (5) minutes. Your rate of typewriting should be at least 40 gross words per minute with not more than eight (8) errors. Please indicate when you are ready to begin and you will be timed. All material should be proofread.

2. Type a rough draft directly from a tape supplied by the teacher. The standards for this work are listed in the objectives.

3. Using a transcribing machine with which you are familiar, as well as dictation on the recorded medium, you will type a rough draft meeting the criteria as stated. The copy is doublespaced, content of the draft is identical to the dictation, copy contains no typographical errors, no spelling errors and no strikeovers. Your typing errors will be corrected by cross-outs and/or legible handwriting. An instructional checklist is available in assisting you in the procedural steps for this objective.

4. A letter has just arrived in the office which needs an immediate answer. Your supervisor has given you a rough draft reply containing errors. Please type a transmittable letter with a carbon copy.

Rough Draft of Reply To:

Reply to letter from Sherron R. Hamilton
El Cajon Valley High School
(Fill in address and salutation)
Thank you for your kind words about my presentation at San Diego.
I is sending ~~your request for~~ the units developed for the california business
education program Guide as listed.

4. (continued)

Personal development
Hanwriting
Reading Instructions
Incoming - Outgoing Mail
Speling & Wrd Usage
Busniess Letters
Working with People

Would you pleace do as suggested in our conversation. Make copies of the matrials and return the originals to my office. We is sorry to have to follow this procedure, bat it is necessary because of the huge volumf of requests.

After you ~~have~~ develope~~d~~ your materials, please send us a copy so we may improve the quality of all units.

Thank you.

Yours sincerely

Lynda Veatch
Secratery to Vocational Coordinator

INSTRUCTIONAL CHECKLIST

PROCEDURAL STEPS - TYPING FROM TRANSCRIPTION MACHINE	PASS	REPEAT	PASS	REPEAT
1. Prepare machine Follow manufacturer's directions for: a. Connecting machine				
b. Inserting tape, disc or belt				
c. Connecting foot lever, if applicable				
2. Operate machine a. Advance				
b. Reverse				
c. Replay				
d. Volume adjustments				
3. Close down machine a. Disconnect				
b. Cover				
c. Store as directed by supervisor				
4. Disposition of tape or disc a. Return with typed product to requestor				
b. Store or dispose of as directed				

5. Using a transcribing machine and dictation from a recorded medium, you will type two letters with a carbon copy and envelopes within a 30-minute period. The letter style will be with the date and closing line at the center point. All words will be spelled correctly, capitalization and punctuation correct, end-of-line word division according to typewriting rules.

6. Given an incoming piece of correspondence requiring a written response, you will compose and type a response to that incoming piece of correspondence. Be alert to generally accepted letter or memo style, placement on page, errors, correct word usage, spelling, capitalization, punctuation, or paragraphing errors.

7. A one-page outline in rough draft has been given to you; you are to type the rough draft in outline format with placement on the page well balanced with all errors corrected.

8. Type in correct form the edited rough draft of a two-page, left-bound, manuscript with one footnote. Use a top margin of two inches for the first page and a one inch top margin for the second page. All other margins should be one inch. You may use the style guide available.

9. Use the previous minutes as a guide. Type a final copy of the current handwritten minutes.

Members Present: Members present same as last months except Harold Cole was not present.

Opening: Same

Information: Results of local job market survey
Cost of hiring extra supervisor
Cost of bussing students
Review of objectives
↓
Business: Review of master plan
Review of salary schedule
Class loads

Educational Program: New equipment to be purchased
Starting CBCE program
Cost of additional equipment needed to implement program

10. A salesman gives you handwritten rough draft tabulated data and asks you to type it in three ways: Open, ruled and boxed with six spaces between columns. Would you please type up the draft in transmittable copy? Please be certain the placement on the page is well balanced, errors have been corrected according to standards previously established.

Mailing Budget capital letters

GEM, INC

			Budgeted	
Advertising Media	Percent 1973-74	Percent 1972-73	Percent 1971-72	Percent 1970-71
Calendars	4.	3.	5.	4.
Catalogs	10.	22.	8.	2.
Magazines	11.	8.	13.	17.
Newspapers	15.	20.	50.	17.
Postage	40.	30.	10.	40.
Radio	20.	17.	14.	20.
Total	100.	100.	100.	100.

CLERK TYPIST TYPING TEST COMPETENCY 402.03/402.04

INSTRUCTIONAL CHECKLIST

PROCEDURAL STEPS - TABULATION TYPING	PASS	REPEAT	PASS	REPEAT
1. Work out column heading: a. Well and evenly spaced on page				
b. Center primary headings				
c. Center secondary headings to primary headings				
2. Columns aligned				
3. Row entries at left of page				
a. Well and evenly spaced				
4. Column entries aligned and correctly placed in appropriate column				
5. No errors				
6. No smudges				
7. No messy corrections				
8. Clear typing impressions				
9. Even typing impressions				

11. You have been given a table with pencilled instructions as to how to rearrange and type the table. You will type a transmittable copy of the requested data with the typed content in conformance with instructions and meeting all previous criteria for typewriting.

12. You are handed a computer printout with instructions to arrange the copy for typing. You should use the ruled form of table. Please type a transmittable copy of the tabulated data.

Your supervisor gives you a computer printout and asks you to type it as a table with open form with four spaces between columns. Would you type up the printout in transmittable copy? Please be certain the placement on the page is well balanced, errors have been corrected according to standards previously established.

13. From the following financial statements, please follow the instructions on the copies and prepare transmittable copies with one carbon copy of each statement. Placement, appropriate spacing between items and corrected errors should be taken into account.

GEM, Inc.

The Year in Brief

Revenues

Guide Book	$ 9,873.21	
Pre/Post Tests	3163.03	
Total Operating Revenues	13,036.24	→

Deposition of Revenues

Supplies	$ 3,687.01	
Interest	1,032.08	
Taxes, Sales	653.00	
Total Deposition of Revenues	5,372.09	
Net Earnings		7,664.15

13. (continued)

GEM, Inc.

Profit and Loss Statement

For the Year Ended December 31, 197~~2~~3

INCOME FROM SALES:						
Net Sales					~~$6,580~~	7,850
COST OF GOOD SOLD:						
Beginning Inventory	$3,723	2,341				
Purchases	3,671	4,761				
Merchandise Available for Sales			$7,394	7,102		
Less Ending Inventory			2,341	2,581		
Cost of Goods Sold					~~5,055~~	4,521
Gross Profit on Sales					~~$1,427~~	3,329
OPERATING EXPENSES:						
Selling Expenses	$ 303	408				
Administrative Expenses	651	328				
Total Operating Expenses					~~954~~	736
Net Profit from Operations					$ ~~475~~	2,593

STOPPING DISTANCES

Miles Per Hour	Dry Concrete	Gravel	Wet Pavement	Packed Snow	Ice or Sleet	Light Snow	~~Dirt~~
20	44	64	71	97	210	112	~~63~~
30	85	131	140	183	414	222	~~105~~
40	148	232	240	324	717	538	~~238~~
50	225	341	368	493	1,101	988	~~434~~
70	438	673	732	978	2,177	1,108	~~533~~
60	319	488	562	705	1,598	1,008	~~488~~

Leave this column out

When you see danger, a time elapses between the moment you see the danger and the time you react to that danger.

Open style with underscoring of the headings.

Please place 4 spaces between the column headings.

Secure copy of a computer printout.

14. Type a mimeograph stencil from the one-page source document following placement instruction. Correct all errors so that the final printed copy is entirely legible.

15. Following placement instructions, type a paper master for offset printer from the source document. The master must be 100% accurate and copy entirely legible.

Note to teacher:

Prepare a piece of correspondence requiring a written response.

Materials needed:

1. Correspondence
2. Letterhead/memo
3. Typewriter

Compose and type a response to the incoming piece of correspondence. You should make certain the content conveys the message intended. You will use the generally accepted letter or memo style, the placement on the page should be well balanced, and the material should be free of major errors in word usage, spelling, capitalization, punctuation, and paragraphing.

Note to teacher:

It is recommended that a tape be made of the spelling words. The order of dictation might be: saying the word, using the word in a sentence and then repeating the word. (Extra words are given.)

WARNING: Do not dictate the words too quickly!

Materials needed:

1. Prepared tape
2. Playback unig
3. Answer sheet(s)

1. Secure the prepared tape from your teacher for the Spelling Test. Each word will be dictated one time, the word will then be given in a sentence, and the word will then be repeated again. Type your answers on the answer sheet provided.

1.	candidate	The candidate was late to the meeting.	candidate
2.	ceiling	The ceiling had a leak from the rain.	ceiling
3.	verified	The two columns of figures were verified.	verified
4.	absences	She had no absences during the year.	absences
5.	relationship	Your relationship to your fellow workers is important.	relationship
6.	reference	It was a dictionary reference.	reference
7.	accept	Please accept the indorsement as written.	accept
8.	you're	You're in the new telephone directory.	you're
9.	describe	Describe the various items of the budget.	describe
10.	half-hearted	It was a half-hearted attempt to do what was required.	half-hearted
11.	self-confidence	A student needs self-confidence.	self-confidence
12.	miniature	The miniature train was in an accident.	miniature
13.	freight	The freight train was on the siding.	freight
14.	noticeable	There were noticeable errors in the paper.	noticeable
15.	grievance	If you have a grievance, see your supervisor.	grievance
16.	all right	The computations were all right.	all right
17.	neighborhood	She was in the neighborhood	neighborhool
18.	superintendent	The superintendent was hiring a new secretary.	superintendent
19.	except	All were present except John.	except
20.	who's	Who's in the swimming pool?	who's
21.	self-respect	Self-respect is very important in one's life.	self-respect
22.	swimming	The swimming pool was without water.	swimming
23.	co-editor	The co-editor was unhappy with the staff.	co-editor
24.	temperature	The cold temperature froze the water pipes.	temperature
25.	conscientious	She was a very conscientious worker in the office.	conscientious
26.	truly	You are truly an outstanding business student.	truly
27.	analyze	Analyze your typewriting errors.	analyze
28.	collection	The collection totalled $12.18.	collection
29.	insistent	The payroll clerk was insistent the form be filled out in ink.	insistent
30.	principal	The principal concern of the group was for survival.	principal
31.	hasn't	Hasn't the book been lost?	hasn't
32.	one-sided	It was a one-sided affair.	one-sided
33.	sophomore	The Sophomore Class was very large.	sophomore

34.	liable	You are liable for all your torts.	liable
35.	achievement	Certification is the capstone of achievement.	achievement
36.	desirable	A business occupation is a desirable goal.	desirable
37.	answer	He was one to answer his telephone on the first ring.	answer
38.	complimentary	You can always find time for a complimentary remark.	complimentary
39.	appearance	Your appearance at work is rated.	appearance
40.	principle	His principles were above reproach.	principle
41.	don't	Don't fret about the work, do it!	don't
42.	pronounce	Pronounce the words correctly.	pronounce
43.	out-of-door	She purchased the out-of-door furniture.	out-of-door
44.	government	The government is for the people.	government
45.	receivable	She qualified for an accounts receivable clerk certificate.	receivable
46.	admitting	She was an admitting clerk in the hospital.	admitting
47.	believe	Can't you believe in him?	believe
48.	productive	It was a productive meeting.	productive
49.	obtainable	A new salary schedule is obtainable from the office.	obtainable
50.	stationery	The letterhead was printed on blue stationery.	stationery
51.	students'	Many students' clothes are in the lost and found.	students'
52.	their	Where is their car?	their
53.	surprise	Betty had a surprise anniversary party.	surprise
54.	annoying	It was annoying to the boss.	annoying
55.	suggesting	Are you the one suggesting the change?	suggesting
56.	courteous	A secretary is courteous at all times.	courteous
57.	developed	It was an item in which the theme could be developed.	developed
58.	cancelled	Pay your premium or the policy meeting will be cancelled.	cancelled
59.	excellence	The excellence of her work was noted by the boss.	excellence
60.	stationary	It is a stationary post.	stationary
61.	day-to-day	This is a day-to-day happening.	day-to-day
62.	there	There is a dollar in the petty cash fund.	there
63.	irrelevant	He felt the matter was irrelevant to the report.	irrelevant
64.	daily	It was a daily task.	daily
65.	equipped	The room was well equipped.	equipped
67.	envelope	The envelope was cut open at the wrong place.	envelope
68.	intelligence	Intelligence does play a part in your life.	intelligence
69.	remittance	The remittance was lost in the mail.	remittance
70.	lose	Do not lose the book.	lose
71.	carried	She carried the typewriters to the desk.	carried
72.	quantity	The quantity was what the secretary had reported.	quantity

73.	paid	She paid the bill on time.	paid
74.	old-fashioned	It was an old-fashioned wedding.	old-fashioned
75.	allotted	The budget was allotted on a percentage basis.	allotted
76.	expense	The clerk totalled the expense record.	expense
77.	significance	There was great significance in those words.	significance
78.	cutting	Do not ust "cutting" remarks in business.	cutting
79.	loose	The dog was loose on the lawn.	loose
80.	twenty-one	Twenty-one items were listed as expenses.	twenty-one
81.	differing	There are differing points of view in the work.	differing
82.	considerable	There was considerable interest in the program.	considerable
83.	decieve	Do not decieve your employer.	decieve
84.	accompanied	The typist was accompanied by the secretary.	accompanied
85.	old-world	It has the old-world flavor.	old-world
86.	recommending	The teacher was recommending her for the job.	recommending
87.	imitate	Do not imitate others; be yourself.	imitate
88.	course	The course was taken with five credits.	course
89.	your	Your book was in the typewriting room.	your
90.	non-fiction	It was a non-fiction book.	non-fiction
91.	omitting	She was omitting all figures on the paper.	omitting
92.	ratified	The contract was ratified.	ratified
93.	developing	She was developing a new set of skills.	developing
94.	remitting	The businessman was never late in remitting his bills.	remitting
95.	February	February has only twenty-eight or twenty-nine days.	February
96.	self-esteem	Self-esteem is an important matter.	self-esteem
97.	dependable	Be dependable in whatever you undertake.	dependable
98.	irritate	Do not irritate your fellow workers.	irritate
99.	groan	The groan was heard all about the place.	groan
100.	weather	The weather was very rainy.	weather
	whose	Whose book was in the typwriting room?	whose
	it's	It's a great day.	it's
	co-captain	The co-captain was sent to the hospital.	co-captain
	convenience	The convenience of a telephone is important.	convenience
	backwards	The train was operating backwards.	backwards
	foreman	The foreman rated the clerk.	foreman
	occurrence	It was a weekly occurrence.	occurrence.

2. In the groups of four words listed below, one is spelled incorrectly. Type the incirrect word correctly in the space provided on the answer sheet. If all four words are correct, type a "C" in the blank.

1.	separate	parcel post	conference	seized
2.	equiped	privilege	ninety	already
3.	haven't	restaurant	alright	forfeited
4.	arrangements	refered	desirable	emergency
5.	relieving	appearance	hoping	accommodations
6.	complimentary	regrettable	stationery	anually
7.	especially	proceed	facilities	noticable
8.	argument	interests	esceeding	description
9.	whether	forty-four	occured	men's
10.	ruler	advusable	preferred	preceding
11.	income	Wenesday	merchandise	blew
12.	entrance	repetetion	occasion	opportunity
13.	plesant	recommend	realize	understand
14.	priviledge	article	ninth	delaying
15.	fourth	doesn't	control	valuable
16.	excellent	accross	volume	appearance
17.	seperate	reference	develop	they'll

18.	paid	careful	legeble	personnel
19.	describe	income	system	personnal
20.	needs	wants	goods	obtaning
21.	profit	loss	chain	eficient
22.	sales	honesty	fegure	clearly
23.	group	capitol	capital	derect
24.	purchase	mass	benefets	clerk
25.	leader	shiper	vending	typing
	law	emphasus	loyalty	package
	really	wining	dealying	bodies
	steping	board	shouldn't	valuable
	boys	happily	bored	I've

Note to teacher:

1. Secure timed write paragraphs of approximately 1.5 syllabic intensity.
2. Prepare a tape containing common business vocabulary at 80 wpm for 3 minutes.
3. Provide a transcribing machine and dictated recorded medium.
4. Prepare a tape containing business vocabulary at 80 wpm for 3 minutes.

Materials needed:

1. Paragraphs of syllabic intensity (1.5); sheet of paper
2. Tape dictation, 80 wpm for 3 minutes; playback unit
3. Transcribing machine; recorded medium; carbon paper (if requested); letterheads
4. Tape of dictation, 80 wpm for 3 minutes; letterheads; playback unit

1. You will be given several paragraphs from which you will touch type for a period of five (5) minutes. Your rate of typewriting should be at least 50 gross words per minute with no more than eight (8) errors. All material should be proofread.

2. After taking dictation at the rate of 80 wpm for three (3) minutes, you will type a rough draft of this dictation. The following criteria should be met: Copy is doublespaced, content of the draft is identical to the dictation, copy contains no typographical errors, no spelling errors, and no strikeovers. Your typing errors will be corrected by cross-outs and/or legible handwriting.

3. Using a transcribing machine with which you are familiar as well as dictation on the recorded medium, you will type three transmittable letters (carbon copies if requested) within a thirty (30) minute period. The standard shall be as follows: Letters typed in an acceptable style with all necessary letter parts included, errors in original and carbon copies corrected, all words spelled correctly, proper usage of words, capitalization, punctuation marks and paragraphs, end-of-line word division is correct and the content of the letter conveys the meaning intended by the dictator.

4. After taking dictation at the rate of 80 wpm for a period of three (3) minutes, you will type a transmittable letter from your notes at the minimum rate of 20 wpm with the following accuracy criteria: acceptable letter format, all words spelled correctly, proper usage of words, capitalization and punctuation marks and all typographical errors corrected.

Note to teacher: None

Materials needed:

1. Prepared list of 20 sets of similar sounding words and sentences using these words
2. Paragraph containing mistakes in word usage, unnecessary repetitions
3. Unedited business letter, letterhead
4. One page of an unedited business report, reference manual and dictionary

STENOGRAPHER WRITTEN COMMUNICATION TEST COMPETENCY 503.03/503.04

From the list of similar sounding words, use the correct word in the sentence. Place your answers in the space provided.

1. personnel	2. personal	1. The ( ) remarks of Lois were noted.	1. ______
3. they're	4. there	2. ( ) going to the show at 8 o'clock.	2. ______
5. past	6. passed	3. The menu was ( ) from person to person.	3. ______
7. principle	8. principal	4. The ( ) clause of the contract was amended.	4. ______
9. except	10. accept	5. Mary was to ( ) the award today.	5. ______
11. capital	12. capitol	6. The ( ) needs repair.	6. ______
13. past time	14. pastime	7. It was Fawn's ( ) to work.	7. ______
15. all together	16. altogether	8. Terry said: "Now, ( ), push.	8. ______
17. its	18. it's	9. ( ) is a great day.	9. ______
19. stationery	20. stationary	10. He was at a ( ) post.	10. ______
21. further	22. farther	11. Bob said it was only ten miles ( ).	11. ______
23. recent	24. resent	12. Charles was a ( ) guest.	12. ______
25. respectably	26. respectfully	13. The report was ( ) submitted to Lois.	13. ______
27. liable	28. libel	14. He was not responsible or ( ) for Lynda's speech.	14. ______
29. coarse	30. course	15. Betty used the ( ) yarn.	15. ______
31. whether	32. weather	16. June liked the ( ).	16. ______
33. peace	34. piece	17. The ( ) efforts were undertaken by Terrence.	17. ______

35. plain
36. plane
37. weak
38. week
39. pleas
40. please

18. The (   ) belonged to Robert. 18.____________________

19. Donald worked a (   ) on the project. 19.____________________

20. The (   ) were heard from Kay. 20.____________________

2. Please edit the paragraph so that there is correct word usage. Eliminate all unnecessary repetitions by substituting similar words that do not change the meaning of the content.

3. Please rewrite the unedited business letter so that the letter is clear, concise, correct, courteous and complete.

4. Use the unedited business report, a reference manual and a dictionary to locate and correct the errors in the report. Be alert to spelling, punctuation, grammar, capitalization, and number errors.

Note to Teacher:

A 100% completion is required for the pretest, so only the completed papers need correcting.

Materials Needed:

None

Directions: Complete the test

1. List three careers that interest you in order of your preference:

    1.

    2.

    3.

2. Using the 1st, 2nd, and 3rd careers of your choice, list two or three of the educational requirements, the employment outlook, the beginning salary, the working conditions, and at least two other levels where you could advance toward.

    a. Careers--educational requirements

Career #1	Career #2	Career #3
1.	1.	1.
2.	2.	2.
3.	3.	3.

    b. Careers--employment outlook

Career #1	Career #2	Career #3
1.	1.	1.
2.	2.	2.
3.	3.	3.

    c. Careers--beginning salary

Career #1	Career #2	Career #3
1. ______________ per month	1. ______________ per month	1. ______________ per month

2. (continued)

d. Careers--the working conditions

Career #1	Career #2	Career #3
1.	1.	1.
2.	2.	2.
3.	3.	3.

e. Careers--advancement levels in the career of your choice

Career #1	Career #2	Career #3
1.	1.	1.
2.	2.	2.
3.	3.	3.

f. Careers--list competencies that you now have that will lead to

Career #1	Career #2	Career #3
1.	1.	1.
2.	2.	2.
3.	3.	3.

Note to Teacher:

This test is self-explanatory. It should be finished in one class period. A 75% would be passing.

Materials Needed:

Pencils for each student.

Directions: Complete the test.

1. Match the products with the possible reason that could cause a price change.

Products	Increase of Demand	Decrease of Demand	Change of Style	Cost of Labor	Cost of Capital	Cost of Material
a. Meat						
b. Clothing						
c. Grain						
d. Vegetables						
e. Automobiles						
f. Milk products						

2. Match the economic trends with the marketing trends.

Economic Trends

a. Growth of population

b. Movement of population to suburbs

c. Increase in family incomes

d. Shorter work week

e. Increase of labor cost

f. Increase of disposable income

Marketing Trends

_____ Shopping centers
_____ Business merger
_____ Growth of luxury purchases
_____ Lengthening of store hours
_____ Increase in service industry
_____ Failure of small businesses
_____ Self service
_____ Growth in discount store
_____ Scrambled merchandise

3. Place a check in each square that represents a step in the channel of distribution for each product, and indicate whether direct or indirect.

Product	Producer	Agent	Wholesaler	Retailer	Consumer	Direct or Indirect
a. Panasonic radio						
b. Jantzen swimwear						
c. Strawberries at a local patch on a roadside stand						
d. Strawberries sold to a canner to be frozen for distribution						
e. Westinghouse TV						

4. List which type of business organization would be applicable for each situation; if there is more than one type, list both and give the reasons.

New Business	Types of Business Organization	Reasons
a. A little old lady setting up a motorcycle shop		
b. Three brothers wish to purchase a car-wash, but are short of money		
c. A group of farmers are considering selling their tomatoes together		
d. Two women are opening a dress shop		
e. A gentleman buys a Goodyear franchise		

5. Directions: Read the case problem; write the answers to the questions underneath it in essay form.

CASE PROBLEM--Since safety features are bringing the decline of the convertible, California customers are demanding through their dealers that something be offered with more than just a sun roof. The dealers in turn have transmitted this request to the manufacturers.

a. Diagram the process (using marketing functions) that business would use in satisfying this customer want.

b. Describe the benefits realized by dealers and manufacturers from this new product.

6. Complete the comparison shopping data:

Item #1: Brand Name: Tide

Small Size: Weight 22 oz. Price 48¢ Price/unit ______

Large Size: Weight 49 oz. Price 88¢ Price/unit ______

Item #2: Brand Name: White Magic

Small Size: Weight 22 oz. Price 30¢ Price/unit ______

Large Size: Weight 49 oz. Price 55¢ Price/unit ______

Item #3: Brand Name: Par

Small Size: Weight 22 oz. Price 32¢ Price/unit ______

Large Size: Weight 49 oz. Price 59¢ Price/unit ______

Differences Noted:

List here any differences you find in prices among the three brands:

Item #1 and Item #2: ______

Item #1 and Item #3: ______

Item #2 and Item #3: ______

Conclusions:

Can you draw any conclusions from the differences you found? Please write whatever conclusions you have drawn: ______

______

______

Note to Teacher:

The pretest is divided into three parts. Part I is an objective test which can be administered in 15 minutes and corrected in class. Those who pass it with 75% accuracy can then proceed to Part II which is an essay section. The remainder of the students can begin working on the competency. Those students who pass Part II then proceed to Part III which consists of preparing and giving a sales presentation. Only after the student has passed Part III has he proven proficiency in this competency. It should take about a week for a student to complete all three parts of this test. Most of the time will be taken getting ready for the sales presentation.

Part I--Go over the instructions carefully with the students. There are a number of statements which are not considered proper for selling. The student should put a "0" in the blank. One or two statements may have more than one answer in Column 2, but the student is to record only one answer in the blank (the one he thinks is most correct). 75% is considered passing on this part.

Part II--The student is to write out what the salesperson would say in response to the customer situation supplied. When correcting this, be sure the student observes proper selling techniques. 75% is considered passing.

Part III--It will take from 3-5 days for the student to prepare for his sales presentation. 70% is considered passing. The following guidelines should be followed:

a. Student selects product and makes arrangements to bring it to class.
b. Student prepares an outline of merchandise information such as that attached, to be turned in completed.
c. Sales presentation must be at least five minutes in length.
d. Equipment and materials for sales presentation:
    1. Cash register
    2. Sales slips
    3. Change
    4. Sales counter
    5. Packaging materials
    6. Basic sales rating forms
    7. Customer rating sheet
e. Teacher selects a student customer to buy the merchandise. Select the customer carefully because the more difficult the customer, the better opportunity the salesperson has to "sell." (Generally, friends do not make good customers. Also, a decided customer does not leave much room for demonstrating all the selling techniques.) One means of keeping the customer going is to set a minimum time limit during which the customer cannot agree to buy. A customer rating sheet is enclosed for evaluating the customer's performance.
f. Review the rating sheet with the student.
g. Have members of the class, who have completed this competency, evaluate along with the teacher.

Part I

Instructions: Those passing this test are then eligible to complete the challenge test to receive credit for this competency.

1. List the five steps of a sales in the order they occur:

a.

b.

c.

d.

e.

2. Match Column 2 with the statement in Column 1. Column 2 may be used more than once. If Column 1 is not a proper (correct) statement that a salesman should use, put a "0" in the blank.

Column 1

_____ a. "Many people feel it is fragile looking, but you go ahead and stand on it for your own assurance."
_____ b. "We have only three left . . ."
_____ c. "I am sorry, Mrs. Jones, we do not carry that brand, but we do have Brand X which we feel performs as well."
_____ d. "Good morning, may I help you?"
_____ e. "Which do you prefer, the red or the blue?"
_____ f. "Will there be anything else today?"
_____ g. "Thank you, come again."
_____ h. "Good afternoon, these denim flares are our most popular selling slack."
_____ i. "You have made a wise choice, Mr. Jones, the suit will wear well."
_____ j. "Do you want to buy these now?"
_____ k. "Would you like to look at a handbag to go with those shoes?"
_____ l. "Yes, they are delicate in appearance, but that is why they are so beautiful."
_____ m. "This tie goes very well with the shirt and we have them on special today only."
_____ n. "Good morning, I see you are looking at our dresses."
_____ o. "Crush the stuffed animal between your hands, Mrs. Jones, . . . just fluff it gently and you restore it to its original condition."

Column 2

1. Merchandise approach
2. Buying motives
3. Customer benefits
4. Overcoming objections
5. Personal approach
6. Assuring customer satisfaction
7. Suggestion selling
8. Closing
9. Customer involvement
10. Sales features
11. Substitution selling

Part I (continued)

2. (continued)

Column 1

_____ p. "Good day, Mr. Jones, I haven't seen you in some time."

_____ q. "No, they are very colorfast!"

_____ r. "We don't have that product in stock."

_____ s. "This electric knife comes with three different blades, one for cutting frozen foods, one for paring fruits, and the third for cutting meat."

_____ t. "Shall I charge this to your account?"

_____ u. "Be sure to stop by our cosmetic department. We are featuring a two-for-one sale. It is our way of saying 'thank you' to our customers."

_____ v. "And I know you would want your new baby to have all the protection possible."

Part II

Instructions: Write out in conversation form what you would say in each of the following customer situations:

1. The customer has just purchased an expensive wallet for her husband's birthday and you are writing up the sales slip.

2. The customer is browsing in the department.

3. "But I don't think I want to spend that much on a dress."

4. "I am looking for one of those things you wear to football games."

5. A second customer enters the store while you are waiting on another customer.

6. "I'm just looking."

7. "There is another one down the street just like this for $2 less."

8. "I want to think it over first."

Part II (continued)

9. "I'm afraid that it will not wash well."

10. "I am not sure; I want to bring my husband in to see it first."

11. Mrs. Jones, your neighbor, walks into your department.

12. "Every time I come in here you never have what I need!"

13. The customer is examining a plastic and a leather handbag.

14. "Do the girls really like this scent?"

Part III

Instructions: You have 3-5 days in which to prepare a sales presentation which will be done before the class. You will be rated on the enclosed rating sheet by the teacher and students in the class. The following is an outline you should follow:

1. Select a product to sell and make arrangements to bring it to class.

2. Prepare an outline of merchandise information such as that attached and turn it in when completed.

3. Equipment you may be asked to use:
   a. Cash register
   b. Sales slips
   c. Change
   d. Packaging materials

4. You will be provided with a student customer to buy your merchandise.

5. The sales presentation will be at least five minutes in length.

6. You will need to hand in the completed merchandise information outline and receive a 70% rating on the basic sales rating sheet to pass.

Sales Demonstration--Written Report

Product ____________________ Price _______

1. Selling Features (6)
   Selling features are facts about the merchandise explained so that the customer realizes the benefit of the product to him. (Product analysis form)

2. Buying Motives (6)
   Explain the appeals that this product has for the customer.

3. Opening Statements (3)
   Give three opening statements that a salesman might use in order to start the sale. (Word them as though you were talking to a customer.)

4. Determining Customer Need (3)
   List three questions that a salesperson might ask to find out the use the customer intends for the product.

5. Visual Aids and Demonstration Devices (3)
   Explain three ways that a salesman might show or demonstrate the product so that customers would better understand the qualities which the product possesses.

6. Objections and Salesman's Answers (3)
   List three objections which a customer might reasonably raise when shopping for the product. Write out the salesman's answers to these objections. (Word them as though you were talking to a customer.)

7. Closing (3)
   Write three statements which a salesman might use to commit the customer to buy. (Word them as though you were talking to a customer.)

8. Suggestion Selling (3)
   Write three statements in which a salesman suggests additional merchandise to go with the purchase or better quality or large quantity. Word them as though you were talking to a customer.

Note to Teacher:

The pretest has been divided into two parts. Part I can be administered to the class as a group. Those who pass Part I can progress to Part II. This part has to be administered on an individual basis. It is expected to take two to three days to complete this second part.

Part I--This test is mostly objective and can be corrected in class. 75% is considered passing.

Part II--This is the performance part of the test and must be administered on an individual basis. 100% accuracy is necessary for passing. Question 1 has a time limit of seven minutes. On problems 1, 3, and 4, the student is expected to calculate the sales tax from a chart.

Materials Needed:

Part I: 18" x 10" blank paper and a ruler

Part II: $30 in play money as follows: 1-$10, 2-$5, 6-$1, 10-25¢, 10-10¢, 8-5¢, 10-1¢
Cash report form
One customer with five transactions
Play money for customer
Cash register
Sales checks--Problem 3 requires only one salescheck, but two main parts need to be filled out
Sales draft and credit card machine
Prepared checks

Part I

Complete each of the following parts as directed:

1. On a sheet of paper, 18" x 10", rule out a simulated cash till and list the denomination of money that would go in each section.

2. List the seven steps in change-making in the order they are done.

    a.

    b.

    c.

    d.

    e.

    f.

    g.

3. Indicate which finger you would use to punch the key on a cash register for each number in the figures below.

    a. $1.69 _____

    b. $31.47 _____

    c. $55.91 _____

    d. $208.26 _____

Part I (continued)

4. Explain when each type of endorsement should be used.

   a. Blank

   b. Special

   c. Restrictive

5. List the three types of accepted identification for cashing checks.

   a.

   b.

   c.

6. Identify the four basic parts of the salescheck on the next page and explain when each would be used.

DECA

DEPARTMENT STORE

Dept	Sales No	Date
		/

NO. 0041

Name ____________
Uses

NO. 0041

QUAN	ARTICLES	CL	PRICE	AMOUNT	
Authorized			Sales Tax		
		TOTAL			

Dept	Sales No	Date
		/

Name ____________
Uses

Charge or C.O.D. Name

Address

City State Zip

Customer's Signature

Circle one: CASH CHARGE COD

Name ____________
Uses

FROM:
DECA
Department Store

NO. 0041
ADDRESS LABEL

Send to:

Address

City State Zip

Delivery Instructions:

Dept	Sales No	Date	C.O.D. Balance	Initial
		/		

Name ____________
Uses

CASHIERING TEST

COMPETENCY 804.03/804.04

Part II

Complete each of the following parts as directed. 100% is necessary for passing.

1. Arrange the $30 supplied in a cash register till. Complete the first half of the cash report form. Ring up each of the six transactions given by a "customer" completing each transaction. Balance out the cash register till using the cash report form. Staple the cash register tapes, properly labeled, to the cash report form.

2. On the following page are six prepared checks. Examine each and indicate which would be acceptable for cashing and explain why the other checks are unacceptable.

   a.

   b.

   c.

   d.

   e.

   f.

3. Complete a salescheck for each of the salescheck problems on the next page.

4. Complete the following problem on either a Master Charge or a Bankamericard sales draft;

   Charge take, Department 370, Clerk 12. 3 sweaters, class 5 @$12.98; 1 blouse, class 9 @$6.49; and 2 pair socks, class 2 @3/$2.00.

Part II (continued)
1. (continued)

a. Qualifying Test 1

Transaction (Tell cashier this amount of sale)	From (Give this money)
$3.27	$20 bill
1.96	$5 bill
2.19	$10 bill
4.40	$5 bill + 2 pennies
3.21	4-$1 bills
1.67	2-50¢, 2-25¢, 3-10¢, 2-1¢

b. Qualifying Test 2

Transaction (Tell cashier this amount of sale)	From (Give this money)
$3.22	$20 bill
1.95	$5 bill + 2 pennies
.81	$1 bill
4.41	$10 bill + 3 pennies
2.22	$5 bill
1.81	$1 bill, 1-50¢, 1-25¢, 2-10¢, 2-1¢

c. Qualifying Test 3

Transaction (Tell cashier this amount of sale)	From (Give this money)
$7.88	$20 bill
1.52	$10 bill + 1 penny
6.95	$5 bill + 3-$1 bills
5.20	$10 bill
3.46	4-$1 bills + 2 pennies
1.21	2-50¢, 2-25¢, 4-1¢ ($1.54)

BE SURE CASHIER FOLLOWS EACH OF THE SEVEN STEPS IN EACH TRANSACTION:

1. How much out of how much
2. Place money on cash ledge
3. Count change to self
4. Count money back to customer, starting with how much out of how much
5. Place money in till and close
6. Tear receipt, put on mdse., bag mdse.
7. Give bag, SMILE, say "thank you"

Part II (continued)

3. Salescheck Test (continued)

Write one or more saleschecks, as needed, for each of the following transactions. When you have finished all of them, write your name on the top of each salescheck, put them in the order of the narratives below, clip them together, and give them to your teacher.

a. Mrs. Robert B. Goldman, 3467 Winding Way, Oakland, CA 94619, comes into Basement Boy's (Dept. 960) during a sale. She buys 8 pairs of Jockey shorts, class 3, @3/$2.50; 6 undershirts, class 5, @3/$2.25; 12 socks, @4/$2.37, class 6; 6 pairs of jeans, class 9, $4.99 each; 4 shirts, class 12--2 @$3.98 each, 1 @$4.98, and 1 @3.49; and 2 pajamas, class 11, @$3.99 each. Mrs. Goldman wants to charge these and takes them with her. Authorization code is "T."

b. Mr. Gary Robman, 7225 Winston Boulevard, Hayward, CA 94402, comes into Jewelry (Dept. 140) and selects a necklace, class 14, @$9.95, and matching earrings, class 14, @$7.95. He asks you to have them gift wrapped ($1.50) and sent to Miss Kay Johnson, 3456 Cloughman Drive, Winnetka, Ill., 45903. Postage will be $.85. Mr. Robman is paying cash.

c. Miss Robyn Hoffman, 2398 Chariot Lane, Rome, CA 97654, comes into Better Blouses (Dept. 390) and picks out 1 crepe blouse, class 4, @$8.95, 1 pink shirt, class 7, @$7.95, and one dinner blouse, class 9, @$15.95. She asks you to charge them, and send the dinner blouse to her mother, Mrs. Allen J. Hoffman, 5419 Goldview Avenue, Castro Valley, CA 94444; the crepe blouse to her sister, Miss Lynn Hoffman, Box 580, Hanford Hall, Stanford, CA 93001 (within the free delivery zone); and will take the shirt with her. If you need an authorization code, ask your teacher for it.

d. Mr. George Follett, 7395 Castleroad Drive, Berkeley, CA 94512, comes into the Radio and TV Department (Dept. 713) and buys a Sony clock-radio, Style 833, Mahogany, class 14, for $99.95, as a gift. He asks for a receipt in case they wish to return it. He pays cash.

e. Mrs. Albert Compton, 5892 104th Avenue, Los Angeles, CA 91002, has been shopping around for an electric oven. Today she phones you in Housewares (Dept. 670) and asks you to charge and send her the Westinghouse oven, class 27, @$49.95, which has a 1-year guarantee. Mrs. Compton's phone number is 698-4534. If you need an authorization code, ask your teacher for it.

f. Mrs. A. G. Milleaux, 34 Bronson Court, Orinda, CA 92000, comes into the Bath Shop (Dept. 623) and asks you for 1 shower curtain, class 8, @$8.95, 1 pair of matching curtains, class 9, @$6.95, and 2 matching bath rugs, class 12, a 3' x 5' one for $7.95 and a round 2' diameter one for $5.95. Mrs. Milleaux pays cash, but asks for a written receipt.

g. Mr. John Phillips, 9518 Gough Street, San Francisco, CA 93017, comes into the Bedding Department (Dept. 80) and orders 1 quilt, class 8, @$18.95, 1 mattress pad, class 3, @$6.95, and 2 pillows, class 15, @$8.95 each. He is paying cash, but wants you to deliver them to his home.

Note to Teacher:

This test is divided into two parts to facilitate its administration and because certain parts require an actual demonstration.

Part I is a written test, requiring eight short answers and the following of a set of instructions. The eight questions can be answered and the students can correct that part and take the listening test in one class period. To qualify to take Part II, a student must get a minimum of 80% of Part I. If each question is counted as worth 10 points and the listening test as worth 20, your figuring is simplified.

Part II has three demonstrations. The first two can be completed in a period, but the third should take at least two days to prepare. Each demonstration has a different standard. The telephone techniques demonstration requires at least 80% of the factors used, the tie demonstration is either right or wrong, and the oral report requires a rating of at least 70% on the rating form.

Materials Needed:

1. Tape of the listening test (this could be dictated, too)
2. Taped explanation of how to demonstrate a tie (could dictate or show student how in person)
3. Tape recorder
4. Trade journals and business publications
5. Oral Communication Rating Sheets and Telephone Techniques Rating Lists
6. A tele-trainer is nice, but the telephone demonstration can be simulated without one

Part I--Instructions: Please answer each question as concisely as possible, using complete sentences except for the lists.

1. What is the name for the language used in business organizations?

2. How does this language differ from the language you use at school and how is it the same?

3. Give an example of a phrase you commonly use which would not be good to use at work.

4. Why should you learn the language of business?

5. Is there a difference in the language used by the top people in an organization and that used by the people in the lower ranks? Yes or no ________. If so, what is it?

6. Does the language you use have anything to do with your ability to supervise? Yes or no ________. If so, what is the relationship of language and supervision?

7. List as many of the general telephone techniques as you can. (There are 14.)

8. Describe in writing one common object so that, without mentioning either the name or its use, it can be recognized.

9. When instructed to do so, please listen to the "listening test" and follow the instructions given in it exactly. You will need a piece of lined paper and a pen or pencil.

Part II--Instructions: You will need to demonstrate your proficiency in each of the following skills:

1. Demonstrate the use of proper telephone techniques with another student selected by the instructor. You will be given a situation and a role to play and must ad lib the conversation. Before you start, you should review the telephone techniques rating list to see what your rater will be looking for. You need to get at least 16 checks out of the 20 or 21 possible to pass.

2. Given the instructions for demonstrating a tie, either on tape or dictated, practice the demonstration until you are sure you can do it well, and then instruct two other students selected by the teacher on how to do it. When you feel that they are proficient, have one student demonstrate and one explain to the instructor what is being done.

3. From a trade journal or business publication, prepare an oral report between five and eight minutes in length. You will need to outline your report on cards and practice giving it before friends and/or a mirror. Review the items on the oral communication rating sheet to see what you will be rated on. You need to get a rating of at least 70% to pass.

LISTENING TEST ANSWER SHEET

NAME CLASS

A | 1 Attention
B | 2 Concentration
C | 3 Discrimination
D | 4 Questioning Attitude
E | 5 Acknowledgment
F | 6
G | 7
H | 8
I | 9
J | 10
July 15, 1900 K | 11
L | 12
M | 13
N | 14
O | 15

Note to Teacher:

This test has been divided into two parts. The first part can be administered to the group and graded in the same class hour. 75% is passing.

The students who pass Part I will go on to Part II. 75% is passing.

Materials Needed:

A pencil for each student

Directions: Complete the test.

1. List six customer services that a department store usually offers:

   1.

   2.

   3.

   4.

   5.

   6.

2. Using the following store policy for check cashing
   1. The person must have two identifications--a driver's license or I.D. card and current signed credit card
   2. Checks must be made out for the amount of purchase, and to the store
   3. Checks must have a printed name, address, and phone number (be personalized)
   4. To authorize a check for cashing, you must record the identification on the back of the check and initial underneath

   and the identification of the following customers, complete the necessary procedure.

   Today is October 1.

   Customer #1
   Linda Lankley has driver's license #N 11403 and a Sears Charge Card #2808A. Her signatures on driver's license and charge plate match.

   Customer #2
   Suzie Short has a California State I.D. Card #21805D and a Mobil Charge Card #238-6910. Suzie's Mobil card is in her husband's name, but the handwriting on each is the same.

   Customer #3
   Boyd Bode has a naval I.D. with picture, #124800F. He does not have charge cards, but he does have his Social Security Card, #1301-32-280. His check signature and naval card signatures match, and his mother works for the Bookkeeping Department of Bikini Factory.

   Customer #4
   Shirley Shapley has her driver's license, #24789J, and an expired 76 Oil Charge Card, #902-4508. Both signatures match. Also, you and Shirley were in the same square dancing class.

   Customer #5
   Carrie Crude has a J. C. Penney's Charge Card, #B-28-056, and driver's license #29805F. Her signatures match on the charge card and driver's license.

3. Directions: Read the case problem and, in essay form, give your answers.

CASE PROBLEM:

You are assigned to the Customer Service Desk in the SeaSide Department Store. The store policy is that the customer is always right, and so exchanges are made with a minimum of red tape. The customer has her sales slip, but the merchandise being returned shows soil, stains, and it is apparent that the merchandise has been worn several times. She complains that when she returned it to the salesperson, she refused to exchange or give her money back and kept her waiting before sending her to Customer Service.

a. Explain how you would handle this customer situation.

b. What suggestions would you make to your supervisor to eliminate this problem in the future?

c. While you are on the Customer Service Desk, the following incidents arise. How will you handle each situation?

1. A customer has lost merchandise in the store that he purchased in another shop.

2. A parent has lost a child in the store.

3. A gentleman who is on some errands for his wife can't find a dress zipper and a set of wooden coasters.

3. c. (continued)

4. A lady wants a new product advertised on TV that mends holds in fabric just by spraying.

5. A very unhappy loud couple are complaining about the absence of a salesperson in the Shoe Department, so they wait and wait; finally, the salesperson returns to the Department, but he is rude, slow, inconsiderate, and could care less about helping them.

4. Identify both the advantages and disadvantages that delivery service offers to the customer and to the store.

Customer		Store	
Advantage	Disadvantage	Advantage	Disadvantage
1.	1.	1.	1.
2.	2.	2.	2.
3.	3.	3.	3.
4.	4.	4.	4.

5. Do businesses charge the customer for providing a credit service?

Yes _______ No _______ Explain your reasoning to support your answer.

6. You are working on the Customer Service Desk and a customer asks what is a revolving charge account, and would like to apply for credit.

   a. You must explain the revolving charge account system: ______________________________

   ____

   ____

   b. Demonstrate how to fill out the application for a charge account using credit application form.

7. Using the following sales tickets, you are to **demonstrate an even** exchange and an uneven exchange:
   a. A lady purchased a red sweater for her daughter, **but the daughter** would like to exchange it for a pink one. The salescheck on the right is the one written **for the original** purchase, which was enclosed with the merchandise.

DECA

DEPARTMENT STORE

Dept	Sales No	Date
		/

NO. 0041

NO. 0041

QUAN	ARTICLES	CL	PRICE	AMOUNT	

Authorized

Sales Tax

TOTAL

Dept	Sales No	Date
		/

Charge or C.O.D. Name

Address

City State Zip

Customer's Signature

Circle one: CASH CHARGE COD

DECA

DEPARTMENT STORE

Dept	Sales No	Date
		/

NO. 0041

NO. 0041

QUAN	ARTICLES	CL	PRICE	AMOUNT	
1	sweater	7		15	95

Authorized

Sales Tax 96

TOTAL 16 91

Dept	Sales No	Date
381	2	yesterday

Charge or C.O.D. Name
Mrs. R. J. Fink

Address
1545 Peace Place

City Peace State CA Zip 90000

Customer's Signature
Mrs. R J. Fink

Circle one: CASH [✓ CHARGE] COD

7. (continued)

b. The customer purchased a leather coat with fur trim and a 4-piece red, Act III, ensemble; however, she has changed her mind and would like to return the vest and get the matching plaid jacket, priced at $45.00 Complete the exchange.

GEM

OF MONTEREY, INC.

Date

Sold to

Address

City

Phone

Cash	Charge	Layaway	Recd on Acct

FOR YOUR CONVENIENCE LAY AWAY & CHARGE ACCTS I hereby acknowledge receipt of merchandise listed above from Howard's for which I promise to pay as agreed. Sales Tax		
TOTAL		
CUSTOMERS SIGNATURE 1626		

LAYAWAY POLICY
Layaways are held for 60 days if a payment is made within 30 days of purchase. Failure to pay balance forfeits the deposit. No refunds — no exchanges after 3 days.

Phone 372 5176 MONTEREY CALIF 460 Del Monte Center

GEM

OF MONTEREY, INC.

Date November 13, 197.

Sold to Mrs Michelle Parks

Address 170 San Leandro Pl.

City Santa Barbara

Phone 965-5555

Cash	Charge	Layaway	Recd on Acct
✓			

1 Leather Coat		
Fur Trim	185	00
1 Act III Slack, red plaid	30	00
1 Act III Shirt, red	26	00
1 Act III Vest, red	26	00
1 Act III Long Sleeve Blouse	18	00
FOR YOUR CONVENIENCE LAY AWAY & CHARGE ACCTS I hereby acknowledge receipt of merchandise listed above from Howard's for which I promise to pay as agreed. Sales Tax	17	10
TOTAL	302	10
CUSTOMERS SIGNATURE 1626		

LAYAWAY POLICY
Layaways are held for 60 days if a payment is made within 30 days of purchase. Failure to pay balance forfeits the deposit. No refunds — no exchanges after 3 days.

Phone 372 5176 MONTEREY CALIF 460 Del Monte Center

Note to Teacher:

In order to facilitate giving the pretest, it has been divided into two parts. Part I requires only short answers, and should take only a class period to take and correct if you have all the students exchange papers, use colored pencils, and correct as you dictate.

Part I has 50 points. A minimum of 80% (40 points) is required for a student to take Part II.

Part II is an essay test of 12 questions. Ten of the questions must be correct to pass this part.

Materials Needed:

Paper
Pens or pencils

DISTRIBUTIVE CORE

EMPLOYER-EMPLOYEE-CUSTOMER RELATIONS TEST

COMPETENCY 807.03/807.04

Part I--Instructions: Please give short answers to each of the following questions. The points for each question are shown in parentheses immediately after the question. You need 80% to pass this test.

1. List at least four benefits a company can enjoy because of good customer relations. (4)
2. List two benefits a salesperson might get from good customer relations. (2)
3. Write a list of at least five positive and five negative attitudes a salesperson can display toward a customer. (10)
4. Write what you might do in the following situation which would please both the customer and your boss: A young couple enters the restaurant you work in carrying a baby that is crying. Your manager is in the kitchen at the moment and the restaurant is full. (8)
5. Write the seven principles for good customer relations. (7)
6. Write at least two things you could do to show friendliness in a sales situation. (4)
7. List the 10 good work habits. (10)
8. List at least five reasons you need to get along well with your co-workers. (5)
9. List at least 10 personality traits a model employee should have. (10)

Part II--Instructions: Please write a concise paragraph on each of the following. Use lined paper to write on. There are 12 questions in this part, and you will need to answer at least 10 completely and correctly to pass.

1. Give three situations in which an employee's actions could result in giving a customer a good image of his company.

2. Write how a customer might feel and respond to a salesperson who showed him the five positive attitudes and how he might feel and respond to a salesperson who met him with the five negative attitudes showing.

3. A store in a big city has salespeople who all have long, uncurled hair, with the men running to beards. They wear faded blue jeans, T-shirts or sweat shirts and either go barefoot or wear sandals. Many wear headbands, necklaces, or amulets. Describe the type of store it is, its probable merchandise lines and market (that is, the customers it is trying to attract) by age, sex, occupations, interests, and socioeconomic status.

4. You work in a large department store, and on your way to your department you see an old woman standing in the main aisle, looking bewildered. You are due in the department in two minutes. Please write what you might do to help the customer and still please your boss.

5. You are working in the bedding Department and have just finished writing up a sales for two bedspreads, six sheets, and two bed pads, which fill three very large bags. Your customer now tells you that her car is in a parking lot three blocks away, and she obviously can't carry them that far. At the moment, you are the only person in your department. What can you do to help your customer without getting your boss down on you?

6. Using the seven principles for good customer relations, write how you might apply each one for a customer who is a businessman in a hurry.

7. Write at least two things you can do in a sales situation to show enthusiasm and to show interest in your customer.

8. Select the three good work habits you feel are the most important and write briefly why you consider each one of prime importance.

9. Write what you would do to get along with a co-worker who is a sales grabber.

10. On the following pages are three case problems. Please read each case and then write a paragraph for each which includes:

    a. A statement of the real problem
    b. Two or three possible solutions
    c. The solution you feel is the best one
    d. Your reasons for selecting that solution

10. CASE PROBLEM

Mr. Mixell, owner of H & M Clothing, told Patrick that he was going to put him in the men's and boys' clothing section, basement floor. Pat thought that the assignment was fine; he felt as though he knew enough about clothing to be able to handle the job. Mr. Mixell told Mr. Brass, the Department Manager, that Pat would be working there.

Mr. Brass greeted Pat, "How do you do, Pat. I'm sure you will enjoy working in this department. I'll show you around and introduce you to the rest of the salespeople. They're a nice, friendly group of women."

Women! Pat couldn't understand what women would be doing in the men's and boys' departments. There was one other fellow who worked on Saturday; except for him, all the other salespeople were women. Three of the salespeople were part-time high school girls who worked evenings and Saturdays, but the remaining five women were older. Most of them had raised families and now, with less to do at home, they had returned to work.

Pat walked back to the cash register with Mr. Brass after he had completed his tour. One of the women he had just met was standing by the register. Pat was going to ask her what key he was to use. "What was her name again?" he thought. He had just been introduced to her--he should be able to remember it. He thought hard, but to no avail. "Well," he thought, "I can skip it. I'm pretty sure my key was 'M.'"

"This is one job that I know I will dislike," Pat thought. "I'm going to see about getting a transfer."

11. CASE PROBLEM

Ed Roush decided it was time to talk to Bill Taylor, for he had been receiving some unfavorable comments on Bill's work from some of the other employees. They had complained that Bill did things his own way and, as a result, they had to do many of his jobs over again. Ed didn't like to reprimand Bill because he thought a lot of the boy, but he felt that the source of the difficulty should be uncovered.

"Come in, Bill, have a chair," said Ed as Bill appeared at the door. "I haven't had an opportunity to talk to you lately. How is the job going?"

"Everything is fine, Mr. Roush, I like my work," said Bill.

"You haven't met any problems?" asked Mr. Roush. "Nothing has been giving you any trouble?"

"Well, some of those other fellows out there act like I've committed a major crime when I forget some little detail that is actually unimportant," said Bill.

"What little details are unimportant, Bill?" asked Mr. Rouse.

11. CASE PROBLEM (continued)

"I don't see why all the packages we send have to be insured," said Bill. "How many times does the post office lose a package?"

"Bill, you know some of the packages we send contain merchandise that is very expensive. If one of those packages were lost or damaged, the company would lose a large sum of money. By insuring the packages we have protected ourselves from a possible loss by paying a fee of only a few cents. That is why we instruct our employees to insure all the packages that contain expensive merchandise."

Bill was silent for a few minutes, then replied, "It still seems to me like a lot of extra work and a waste of money when the packages are never lost."

12. CASE PROBLEM

The Mail Order Department consisted of five girls. Evie Leppart, a part-time trainee, is one of them. The girls take orders from customers who come to the store and also by telephone. Evie likes the job, though she does think that the store should have more girls working at peak times.

One thing Evie dislikes about the job is working with Jane Roberts. Jane had worked in the Mail Order Section since she graduated from high school the past June, and she is a very capable worker with an effective, speedy method of doing everything. But Janie has one habit which irritates Evie considerably--she is always telling Evie what to do. Usually she tells Evie how to do it in the easiest manner, but Evie resents the order anyway. Evie isn't going to have someone who is only one year older than she is telling her what to do, especially that Jane Roberts, who thinks she really knows it all.

Evie and Jane were both working Monday afternoon. Only one customer was in the department and the phones were unusually quiet. Jane's phone rang; she answered it and took the message. Then she handed Evie a list saying, "Here, fill out an invoice on these items. I have to go pick them up." Then she walked away.

Evie thought to herself, "I'll take no more orders from Jane. She can fill out that invoice herself. When I get an order I have to do all the work on it myself. Why should I help her?" She placed the list back on Jane's desk.

"Where's that rush order for the McCormick Company? I have to take it right over to them," bellowed Mr. Dirks as he approached the Mail Order Section. Mr. Dirks was the supervisor.

Evie was wondering what rush order he meant when she saw Jane approaching with several items. "Here is the order, Mr. Dirks," said Jane, "Evie has the invoice. I gave it to her to fill out while I got the items for the order."

"Fine, give me those things, Jane," Mr. Dirks replied, "I'll get them there immediately. Where is the invoice, Evie?"

Note to Teacher:

The pre/post test has been divided into two parts. Both parts can be administered to the class as a group and will take a class hour to complete.

Part #1--A crossword puzzle is an alternative way to present this pre/post test. Students may not be familiar with crossword puzzles and may need help at first. Don't let them get hung up on one clue; have them go on and it may provide an added clue later that will help them. 90% is considered passing.

Part #2--The case problem is not complete, in itself, as the students will need to add to it by answering the questions (1 through 3). Some of the answers will differ and could add to a good group discussion. 85% is considered passing.

Materials Needed:

Materials included in unit.

Part #1--Crossword Puzzle: From the following clues, fill in the puzzle on the next page.

Across

a. Media (External)
  1. Black and white and read all over
  2. A talking box
  3. The Boob Tube
  5. A highway special
  8. Black, white, colorful, glossy, and read all over
  9. It's a bird, it's a plane . . . Yes, it's a _____ _____
  11. Occupant

b. Media (Internal)
  4. Attached to Levis
  6. There are three types: open, closed, semi-open
  7. Groups of arranged merchandise in a store
  10. Received by a buyer
  12. Spoken from above
  13. Free newspaper thrown in front of your home

Down

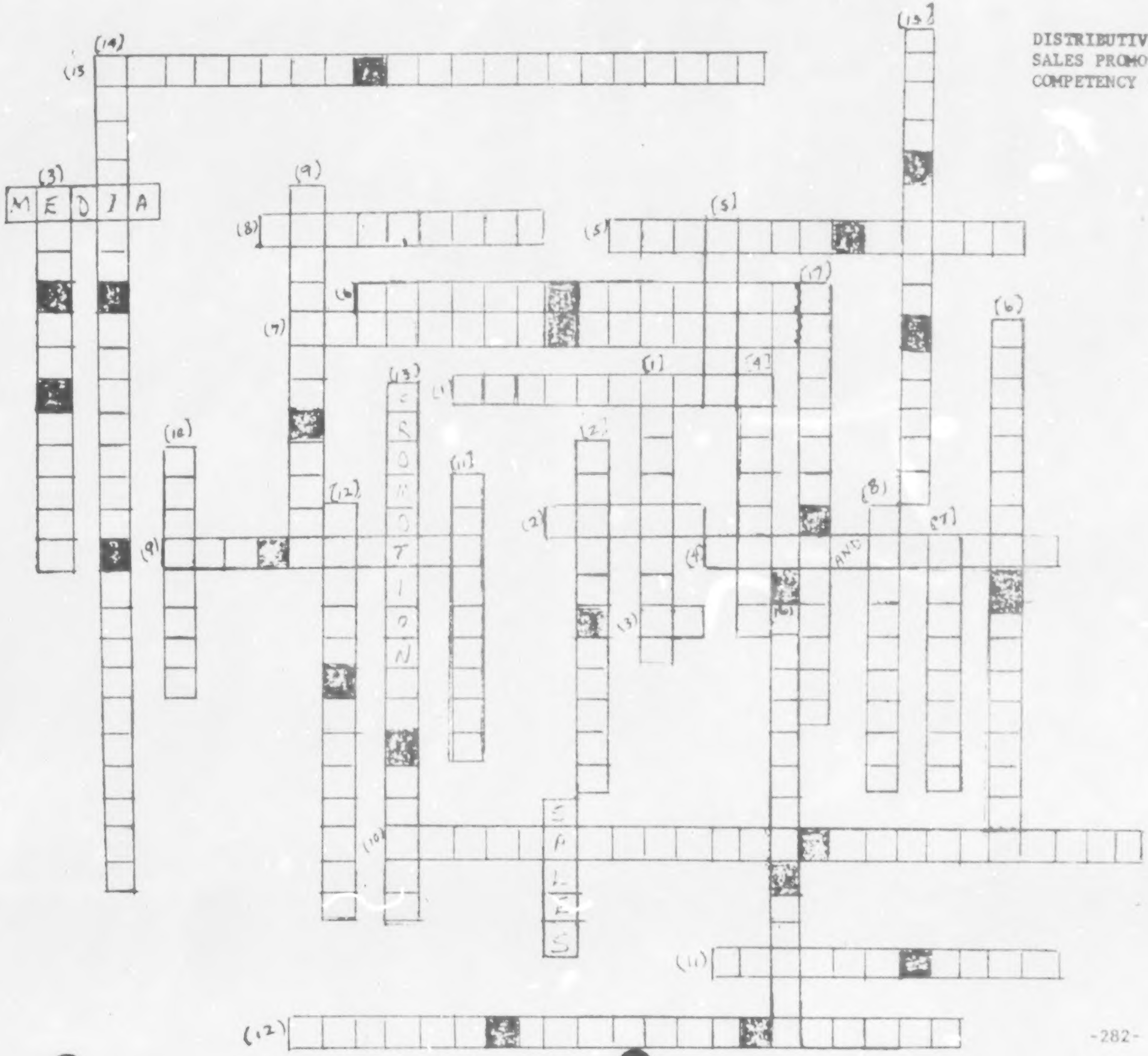
c. Promotional Activities
  1. Given to a media and prayed for
  2. The reverse of "fair trade"
  9. Clothing being worn to show to an audience
  13. Playing bingo at a service station or grocery store
  14. Santa Claus and Easter Bunny
  15. Avon and Fuller Brush open with a . . .
  16. Exchange of name, company, phone number, etc., on paper
  17. They come in blue and green with glue

Down (continued)

d. Types of Sales

3. E.O.M. Sales means
4. An activity in front of a store is called a __________ sale
5. A sale where the merchandise is rounded off to the even amount of money
6. A Firecracker Sale
7. Washington's __________ Sale
8. To discontinue a line of merchandise is a __________ sale
10. A January White Sale is a __________ sale
11. A sale held in the storage area
12. A starting business sale

DISTRIBUTIVE CORE
SALES PROMOTION TEST
COMPETENCY 808.03/808.04



DISTRIBUTIVE CORE
SALES PROMOTION TEST
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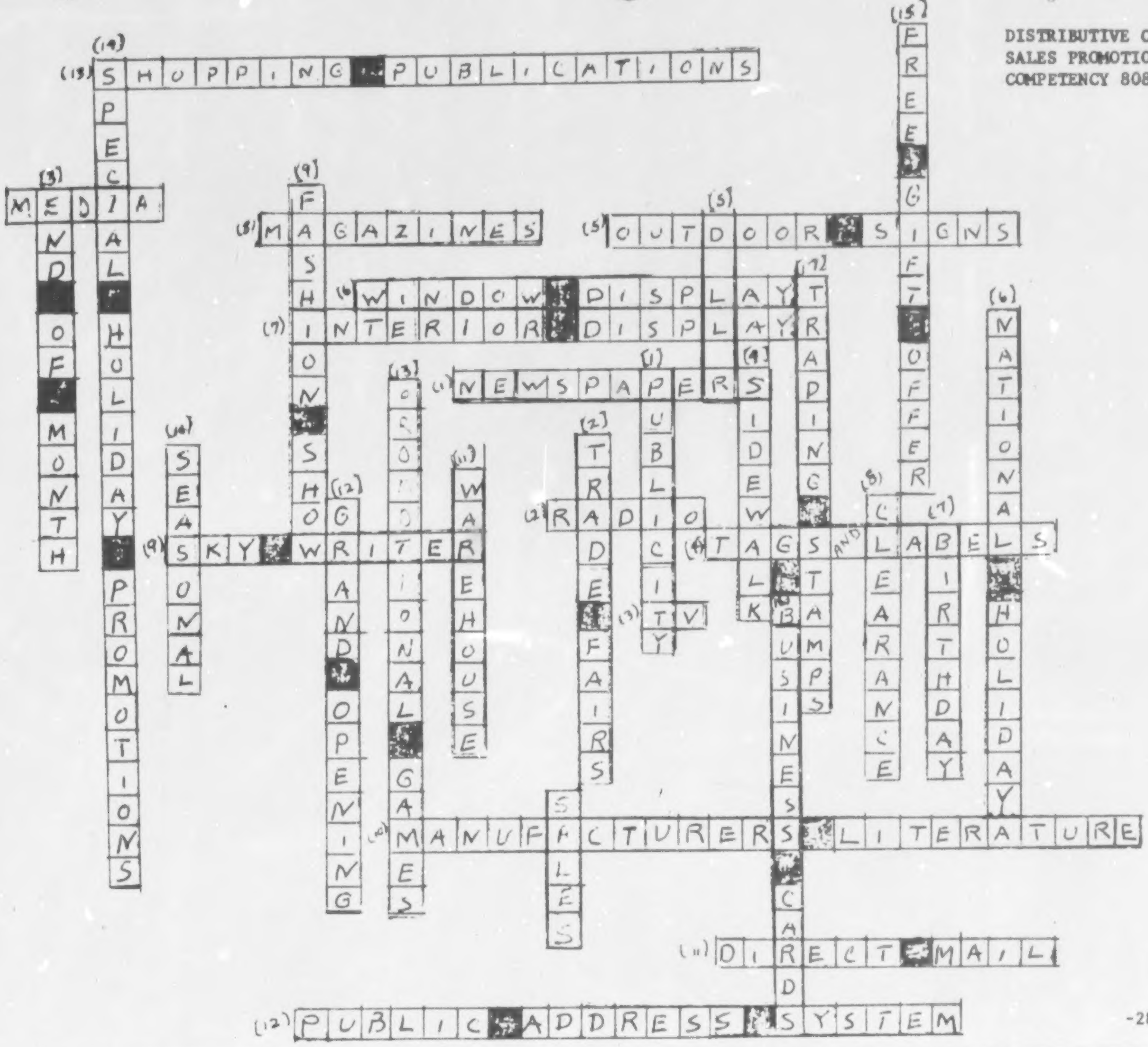


Part #2--Case Problem: Read the following case problem and answer the questions.

SHOPPING CENTER BEACH AND SUMMER WEAR PROMOTION
Location: Your town
Date: August 15 and 16
Time: 10 a.m. to 6 p.m.
Merchandise: Men's, Women's, and Children's Sportswear Departments
Media: Radio--2 stations (rock and popular)
Window Displays
Public Address System
Direct Mailer for presale on August 14

QUESTIONS:

1. What are the responsibilities of the salespeople in the Men's, Women's, and Children's Sportswear Departments?

    1. ____________________
    2. ____________________
    3. ____________________
    4. ____________________
    5. ____________________

2. What are the responsibilities of a salesperson in the Cosmetics Department?

    1. ____________________
    2. ____________________

3. Is this a promotional or an institutional activity? Why?

____

____

____

Note to Teacher:

None

Materials Needed:

All the forms used in the Stockkeeping Competency are used in the test, including

1. Stockkeeping case problems
2. Stock situations
3. Inventory form
4. Stock cards

A taped set of inventory calls (one taken from an actual inventory would be excellent) or a list for dictation.

1. For each of the following reasons for inventory shortage, please give one way to eliminate or reduce those losses:

   a. Shoplifting
   b. Employee theft
   c. Breakage and damage
   d. Inaccurate marking
   e. Errors in recording
   f. Inaccurate inventories
   g. Careless record keeping

2. For each of the case problems on the storing and arranging of merchandise, please identify the stockkeeping error(s) and state what should have been done.

3. For each of the retail situations case problems, list the safety rules which should apply.

4. Write the main reasons each of the following persons needs to know exactly what stock is on hand:

   a. Merchandise manager
   b. Buyer
   c. Salesperson

5. Using the retail inventory sheet and the tape of inventory calls for one fixture, fill out the form completely.

6. Fill in the stock cards using the information from the attached order copy.

Skyline DECA Store
12250 Skyline Blvd.
Oakland, CA 94619
531 - 9161

Resource R2	**Name** Jolly Roger	**Date of Order** 9/18/84		**Order Number** 107
	Address 1495 7th St.	**Date to be Shipped** 9/22/84		**Ship to:** Skyline DECA Store 12250 Skyline Blvd. Oakland, CA 94619
	City & State Los angeles 94000	**Terms** - - - - - 2/10	**Dating** - - - - - 30 net	
Ship Via: UPS				

Stock #	Description	Total Units	Unit Cost	Total Cost	RETAIL	Total Retail
1 - 017	Ballpoint pen, fine (gross)		17.28	103 68	ea .19	164.16
	black	2 gr.				
	red	1 gr.				
	blue	2 gr.				
	green	1 gr				
		6 gr				

All orders to be valid must be signed Mdse. Mgr.

Joan Kane

Note to Teacher:

The pre/post test has been divided into two parts. Both parts can be administered to the class as a group and could be given in a class period and a half. 75% is considered passing.

Part I--This test is objective and can be corrected in class. Please note materials needed for question #7.

Part II--The teacher could add to information provided in the assignment, but keep in mind this fits the guidelines for the DECA Advertising Contest (included also are two rating sheets; one is the DECA Rating Sheet). Please note materials needed.

Materials Needed:

Part I, question #7: The teacher should prepare four magazine illustrations covering the four types. These should be cut out of the ad and matted on cardboard so they can be passed around the class during the test.

Part II: The teacher should provide the students with cut out illustrations to be placed in their ads. This is not an art contest, but an advertising layout assignment.

Part I

1. List 10 media with one strength and one weakness for each:

	Media	Strength	Weakness
a.			
b.			
c.			
d.			
e.			
f.			
g.			
h.			
i.			
j.			

2. In advertising there are four objectives. List them:

1. ______________________
3. ______________________
2. ______________________
4. ______________________

3. Identify a basic psychological want for each of the following products:

		Psychological Want			Psychological Want
a.	Life insurance		e.	Large color television	
b.	Rolls Royce		f.	Large reclining chair	
c.	Home alarm system		g.	Refrigerator	
d.	Perfume or cosmetics		h.	Camera	

Part I (continued)

4. Match at least one product with each of the secondary wants.

Answers	Secondary Wants	Products
________	1. Bargains	A. Lysol
________	2. Information	B. Cosmetics
________	3. Cleanliness	C. Mink coat
________	4. Efficiency	D. Dishwasher
________	5. Convenience	E. Fire extinguisher
________	6. Dependability and quality	F. Dictionary
________	7. Style and beauty	G. Tooth paste
________	8. Curiosity	H. New product on the market
________	9. Economy and profit	I. Honda car
________	10. Healthfulness	J. Kodak film
________	11. Time saving	
________	12. Safety	

5. Identify a headline type with each of the following examples:

	Type
1. "Do you have the Wet Look?"	________
2. Volkswagen presents "The Thing"; it can be Anything!!!	________
3. "Used cars bought from us come with 12-month, 12,000-mile guarantees."	________
4. Think Thins.	________
5. So modern, it belongs in the 21st century . . . The Polaroid SX-70.	________

Part I (continued)

6. List six types of body copies:

1. ______________________ 4. ______________________

2. ______________________ 5. ______________________

3. ______________________ 6. ______________________

7. Your teacher will give you four different magazine illustrations. Identify each type.

1. ______________________ 3. ______________________

2. ______________________ 4. ______________________

8. Sketch a logotype from a company that you are familiar with, including the three basic parts and label them.

9. What part of an ad gives the reader the feeling of exclusiveness or inexpensiveness?

10. There are three types of borders. Name them:

1. ______________________ 2. ______________________

3. ______________________

Part II

Draw a newspaper ad layout for a waterbed, given:

1. An illustration (choice of 2 or 3)
2. Merchandise facts
    a. Solid oak platform frame
    b. Triple reenforced mattress that is puncture-proof (1-year guarantee)
    c. Water heater (1-year guarantee)

Note to Teacher:

Creative selling is a specialty which should only be attempted by students with a vocational interest in selling. The tests provided below may be used as a pretest, although most students will not have the skill to pass this competency without adequate preparation.

Part I--The Basic Sales Techniques Study Guide may be utilized as Part I of the test. Passing on Part I will be 90%. Questions 1 and 2 are taken from the pretest in Competency 803. Questions 3 and 4 may have more than one answer, but the student is expected to provide only one answer.

Part II--The performance test will consist of a 10-minute sales presentation. The following is a suggested outline:

a. The student selects an item of merchandise or service of his choice which has a significant value ($50-100 minimum).

b. The student selects one of the three ways of selling:
    Inside
    Outside retail selling
    Wholesale or manufacturing selling

c. Require the student to prepare a product information outline such as that given in Competency 803.

d. The creative sales rating sheet should be discussed with the student.

e. Select the customer carefully because the more difficult the customer is the better opportunity the salesperson has to "sell." (Generally, friends do not make good customers. Also, a decided customer does not leave much room for demonstrating all the selling techniques.) One means of keeping the customer going is to set a minimum time limit. (If you have a 10-minute minimum, then the customer cannot agree to buy the merchandise or service until after six minutes have elapsed. This forces the customer to raise objections and in other ways be difficult.) A customer rating sheet is enclosed for evaluating the customer's performance.

f. 80% is considered passing on this test.

g. Use several students in the evaluation. (Be sure they have done the unit though.)

Materials Needed:

Cash register
Change fund ($30)
Credit card machine
Credit card sales slip
Saleschecks
Packaging materials
Customer money, credit card, and checkbook
Table, counter, or desk

Part II

You are to conduct a 10-minute sales presentation. The following outline should be followed in preparing for the sales presentation:

1. Select an item of merchandise or service which has a significant value ($50-100 minimum).
2. Decide on which type of selling you will use.
   a. Inside retail
   b. Outside retail
   c. Wholesale or manufacturing
3. Prepare a product information outline.
4. Go over the creative sales rating sheet carefully.
5. The teacher will provide you with a customer.
6. You will be evaluated by the teacher and several students. Passing will be 80% on the creative sales rating sheet.

The pre/post test is divided into three parts. Parts I and II can be administered to the class as a group and could be given in a class period and a half. Part III will need about a week before the student could get his props and merchandise together. If the student is well organized, he will need only one class period to put up his display.

Part I--This test is objective and can be corrected in class. Please note materials needed for question #10. 75% is considered passing.

Part II--This is performance in nature. The student will need teacher's approval of purpose, theme, and sketch before making a display.

Part III--The preparation for the display should not take class time, and should be self-directed by the student.

Materials Needed:

Part I: Slides or matted pictures of the three types of window displays and the seven types of interior displays for question #10.

Part II: The teacher could add a specific project to display or let the student select his own merchandise.

1. Construction paper
2. Scissors
3. Ruler

Part III: The teacher is a good resource person to phone local merchants, if needed, to obtain materials needed by the student.

Part I

1. List the objectives of display.

   1. ____________________ 3. ____________________

   2. ____________________

2. The four steps in selling through display are as follows:

   1. ____________________ 3. ____________________

   2. ____________________ 4. ____________________

3. Fill in below:

Primary Colors	Secondary Colors	Tertiary Colors
1. ________	1. ________	1. ________
2. ________	2. ________	2. ________
3. ________	3. ________	3. ________

4. A monochromatic color scheme of yellow is ____________________

5. An analogous color scheme of green is ____________________

6. A complementary color scheme of blue is ____________________

7. A split complementary color scheme of purple (violet) is ____________________

8. A triadic color scheme of orange is ____________________

Part I (continued)

9. Sketch and label each with a P (if a principle) or an E (if an element) of design.

a. Repetition (exact)

d. Dominance

b. Repetition (alternation)

e. Contrast

c. Repetition (progression)

f. Harmony

Part I (continued)
9. (continued)

g. Balance (formal)

j. Proportion

h. Balance (informal)

k. Unity

i. Balance (visual)

l. Texture

Part I (continued)

10. From slides or pictures, identify the following:

Types of Display Windows

1. ____________________
2. ____________________
3. ____________________

Types of Interior Displays

1. ____________________
2. ____________________
3. ____________________
4. ____________________
5. ____________________
6. ____________________
7. ____________________

11. List the six elements of a display.

1. ____________________
2. ____________________
3. ____________________
4. ____________________
5. ____________________
6. ____________________

Part II

Plan a display

1. Purpose ______________________________

2. Event (seasonal or community) ______________________________

3. Theme ______________________________

4. Preliminary sketch:

Note to Teacher:

The test is broken down into two parts--a written test and a performance test on bagging and on cash register/scale operation. Administer the written test. Those who pass progress to the performance test. The others will begin working on the competency.

Part I--The written test is self-explanatory. Passing is 75%.

Part II--Bagging--The bagging test has a two-minute time limit on 25 items of merchandise. These should be the same items used in the test on the cash register. The standard would be "correctly" as judged by the teacher on the checksheet.

Part II--Cash Register/Scale--The cash register test has a three-minute time limit on 25 items of merchandise with 100% accuracy on the total and the checksheet. A checkout counter situation should be created. A customer approaches with a grocery cart. She is greeted by the checker (three-minute time limit begins). As items are rung up, they should be placed on a counter or table. When the total is calculated, the customer hands money to the checker, change is given with the register receipt, and the customer is thanked (end of time limit). The customer may talk to the checker during the test.

Materials Needed:

Part I: Store layout diagram

Part II (Bagging):
- a. 25 merchandise items placed on a counter
- b. A chair or stool lower than the counter for placing the bag
- c. A variety of paper bags
- d. Bagging check sheet

Part II (Cash Register/Scale):
- a. Cash register
- b. Produce scale
- c. Change for cash register--$30
- d. Customer money
- e. Grocery cart of merchandise (25 items)
  - canned food
  - jars
  - boxes of food
  - bags of produce
  - meat
  - bread
  - dairy (eggs)
  - nonfood items (bleach, soap, ammonia, etc.)
  - small items--large items
- f. Checking out merchandise checksheet

Part I

Directions: Complete each of the following parts as directed.

1. List four normal arrival procedures and give the time each should take.

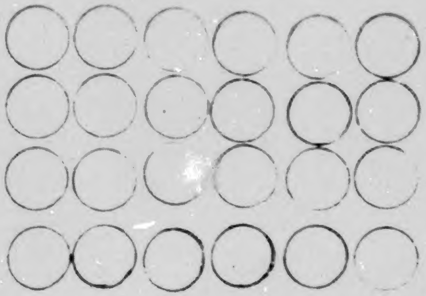
2. Describe the six activities involved in preparing your work area.

3. Select five departments from each layout (supermarket and selfservice store) and explain the reasons for their location in the total store layout.

4. Place a check before each item that is subject to California sales tax:

___ a. bread
___ b. detergent
___ c. men's sox
___ d. apples
___ e. garden fertilizer
___ f. table salt
___ g. apple tree
___ h. vitamins
___ i. tomato plant
___ j. cooked popcorn
___ k. liquor
___ l. pop
___ m. Kleenex
___ n. dated magazine
___ o. orange
___ p. notebook

5. a. Number the cans in the order in which you would price-mark them in the carton.

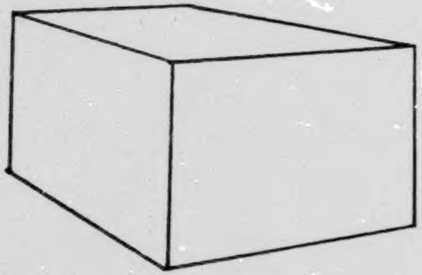


b. Explain why legible price-marking is important to the store.

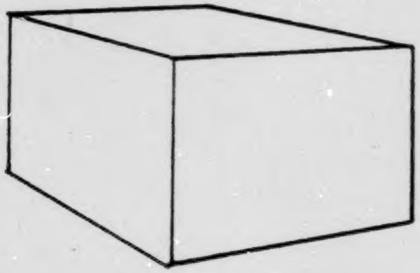
Part I (continued)

6. Illustrate how you would open each of the following cartons for price-marking:

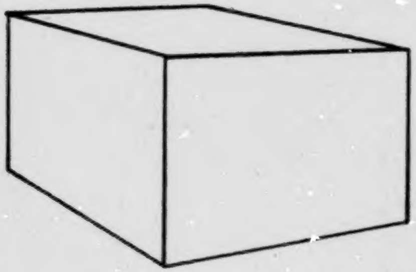
Items put on the shelf in their original carton



Carton with two layers. How would you price-mark the second layer?



Carton with three layers



Part II--Bagging

The bagging test is a performance test with a two-minute time limit and a checksheet. You must score 100% on the checksheet. The following outline will be followed:

1. Review the checksheet.
2. Twenty-five merchandise items will be placed on a counter or table.
3. You will be provided with a variety of paper bags from which to choose.
4. Bag the items correctly.
5. If a customer is used you must recognize her and show courtesy.

Part II--Cash Register/Scale

The cash register/scale test is a performance test with a three-minute time limit and 100% accuracy on the total and the rating sheet. Use the following outline:

1. You will be given a cash register, scale, checkout atmosphere.
2. The customer approaches with a grocery cart. (Your time begins when you greet her.)
3. Complete all the activities of checking.
4. The time stope when you thank the customer at the end of the transaction.

Note to Teacher:

This test is divided into three parts. The first part is a written test; the second a performance test using forms, diagrams, etc.; and the third is a performance test on closing a cash register, wrapping goods for mailing, and estimating sizes.

Part I has a total of 35 points. To satisfactorily complete this part, the student must get 30 points. (Questions 4, 5, and 6 are worth two points for each answer.)

Part II requires all the materials used in the competency (see materials needed). In this part, all responses should be complete and correct (masters help in correcting them). No omissions or errors can be permitted, but the student can be allowed or encouraged to use an adding machine or any other normal aid.

Part II will require a testor. One way to handle this is to test the first student to take this test yourself and, if he passes, instruct him on the responsibilities of a testor and have him do the testing for this section. If there are many students working on this competency at the same time, it would be well to rotate this responsibility. For this section, complete accuracy is required as well as completion of the demonstration. If you wish, however, the size estimates would be acceptable if four of the five were correct.

Materials Needed:

Part II:

1. Delivery schedule for your area
2. List of five items to be delivered with their destinations
3. Invoice
4. Set of price tags made for the merchandise listed on it
5. Lay away problems
6. Lay away forms
7. COD salescheck problems
8. Saleschecks
9. Five merchandise tags or labels, copied or taken from various kinds of merchandise
10. Unit control form (a price line sales sheet can be used)
11. Set of price tags for one department, all classifications and prices
12. Stock diagrams
13. Stock cards

Materials Needed: (continued)

Part III:

1. Cash register
2. Daily sales report
3. Cash bag for change
4. Cash report form
5. Merchandise return sheet
6. Voids envelope
7. Two boxes
8. Address labels
9. Shipping charge vouchers
10. Wrapping supplies

DISTRIBUTIVE OCCUPATIONS SALESPERSON, GENERAL TEST COMPETENCY 902.03/902.04

Part I

Instructions: Please answer each of the following with a list or a concise sentence or two: (35 points)

1. List four normal arrival procedures and give the time each should take. (4)
2. Describe the six activities involved in preparing your work area. (6)
3. Write the five steps to be followed for a lay away. (5)
4. Write what the responsibilities of a salesperson are in preventing and controlling shoplifting. There are at least three. (6)
5. State what preventative measures are currently being used for shoplifting. (8)
6. List three trade journals which would be useful for your career area and state in what way each would be helpful. (6)

Part II

Please get the forms involved and follow the instructions below:

1. Using a delivery schedule and a list of five packages to be sent and their destinations, please give a delivery date for each package.
2. Using an invoice and a set of price tags made for that merchandise, write the sizes and colors on the price tags and verify that each tag is correct.
3. Using lay-away problems and lay-away forms, fill in the forms for the last three transactions.
4. Using COD problems and saleschecks, fill out saleschecks for the last two transactions.
5. Using five merchandise tags or labels, write at least two customer benefits for each label.
6. Using a unit control form and a set of price tags for that department, fill in the form completely.
7. Using stock diagrams and stock cards, count the number of items and enter the information on the stock cards.

Part III

Instructions: Please demonstrate each of the following for your instructor, or for a student he has instructed to be your testor:

1. Read and close out a cash register. Explain each step.
2. Using two boxes of merchandise, address labels, and shipping charge vouchers, wrap both boxes for mailing and complete the forms.
3. Go to the next classroom with your testor, with permission, and list five students and their shirt or dress sizes. You may ask each student his or her name, but you must estimate their size and write it. Your testor will verify your estimate.

Note to Teacher:

The pre/post test is divided into two parts. Part I can be administered to the class as a group. Those who can pass Part I with 80% or better can take Part II. This part has to be administered on an individual basis. Part I will take half of a class hour and Part II will take one class hour for each student.

Part I--This test is objective and can be corrected in class. Question 12 will need the Employment Application form.

Part II--The teacher should get a participating service station for testing. The student will need a couple of days to prepare his sales presentation. The teacher could drive his car in for gas and have the student go through the whole presentation. The teacher and/or the station manager will use the rating sheet. Passing would be 120 points out of 150.

Materials Needed:

Employment Application form
Rating sheet

Part I

1. Name four standards of customer greetings other than your tone of voice:

   1. ______________________________

   2. ______________________________

   3. ______________________________

   4. ______________________________

2. What are the important points that leave a good impression with customers on the attendant's appearance?

   1. ______________________________

   2. ______________________________

   3. ______________________________

   4. ______________________________

   5. ______________________________

3. What is the best way to acknowledge a customer when

   a. You are sitting in the office ______________________________

   b. You are on the phone ______________________________

   c. You are repairing a tire ______________________________

   d. You are waiting on another customer ______________________________

Part I (continued)

4. a. Write in conversational form a greeting to a customer:

Attendant, "______________________________."

Customer, "______________________________."

b. Selling the customer:

Attendant, "______________________________."

Customer, "______________________________."

c. Confirmation of the sale:

Attendant, "______________________________."

Customer, "______________________________."

5. After the sale and confirmation, the attendant will start providing services. List any or all services in order performed. (Give all details, but don't include "under the hood" services.)

1. ______________________
2. ______________________
3. ______________________
4. ______________________
5. ______________________
6. ______________________
7. ______________________
8. ______________________
9. ______________________
10. ______________________

Part I (continued)

6. Name the five most important things to check under the hood.

1. ______________________ 4. ______________________
2. ______________________ 5. ______________________
3. ______________________

7. The oil is low. What would you say to your customer?

Attendant, "______________________."
Customer, "______________________."
Attendant, "______________________."

8. You have now found out something else is wrong with the car. Make up what is wrong and tell the customer.

Attendant, "______________________."
Customer, "______________________."
Attendant, "______________________."

9. When providing windshield service, the attendant should clean all glass surfaces (after all car windows). Name three other areas.

1. ______________ 2. ______________ 3. ______________

Part I (continued)

10. List 10 extra services that an attendant could perform to leave a good impression with his customer.

1. ________________
2. ________________
3. ________________
4. ________________
5. ________________
6. ________________
7. ________________
8. ________________
9. ________________
10. ________________

11. Name eight dangerous areas in a service station where an attendant could get hurt!

1. ________________
2. ________________
3. ________________
4. ________________
5. ________________
6. ________________
7. ________________
8. ________________

12. Fill out Service Station Application form.

Part II

A. Student-prepared outline of sales presentation (25% of grade).

B. Student presentation at the local service station (75% of grade). Evaluation by rating sheet form.

Note to Teacher:

This test is self-explanatory; it could be accomplished in one class period and should have 75% to pass.

Materials Needed:

Paper and pencil

Directions: Complete the test.

1. List five daily habits that a waiter-waitress should perform prior to arriving for work:

    1.
    2.
    3.
    4.
    5.

2. List five things you should do upon arriving for your work shift:

    1.
    2.
    3.
    4.
    5.

3. In writing, describe how you should do the following things:

    a. Carry water to a table.

    b. Pour coffee. On which side of the customer should you serve?

    c. Carry plates. On which side of the customer should you place the plates?

    d. Handle condiments. State also what condiments are.

4. List two food merchandising techniques for each of the following:
    a. Table arrangements:
        1.
        2.
    b. Food placement on table
        1.
        2.
    c. Food displays
        1.
        2.
    d. Suggestion selling
        1.
        2.

5. List 10 characteristics of sttitudes that you should have as a waiter-waitress:
    1.
    2.
    3.
    4.
    5.
    6.
    7.
    8.
    9.
    10.

6. Match the following restaurant terms with their meanings:

a. condiment
b. fricassee
c. shish ke-bab
d. fillet
e. a la mode
f. ala carte
g. buffet
h. consomme'
i. sauteed
j. crepes suzette
k. mousse
l. capon
m. chowder

_____ topped with ice cream
_____ separate price for each item on the menu
_____ a dessert made with thin pancakes, usually using fruit
_____ lightly braised in butter
_____ a clear broth
_____ a seasoning or relish, as pepper, mustard, sauces, etc.
_____ a meat dish, usually flamed or charcoaled lamb, but can have a variety of meats and begetables
_____ meat cut into pieces and stewed
_____ a sideboard or table at which guests serve themselves food
_____ a thick soup usually with onions and potatoes and often clams and milk
_____ a dessert, a variety of frothy pudding
_____ a boneless, lean piece of fish or meat
_____ oversized fattened rooster

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7. List two facts that you as a waiter-waitress should be aware of for each of the following:

   a. Safety of the guest

   b. Legal considerations

   c. Labor unions

   d. Fringe benefits to employees

   e. Sanitation laws

   f. Theft and the importance of control

8. List three responsibilities in maintaining your service area:

   1.
   2.
   3.

9. List three responsibilities in maintaining your work station:

    1.

    2.

    3.

10. List the steps you would use in the preparation and presentation of a guest check:

    1.

    2.

    3.

    4.

    5.

    6.

    7.

THE PLACE

MENU

CHEESE PIZZA	IN	O[illegible]
SMALL	1.01	1.11
MEDIUM	2.02	2.12
LARGE	3.08	3.18
PEPPERONI PIZZA		
SMALL	1.58	1.68
MEDIUM	2.64	2.74
LARGE	3.70	3.80

HAMBURGERS	60
TACOS	35
ONION RINGS	35
FRIES	25

DRINKS	S.	M.	L.
COKE	15	25	35
7-UP	"	"	"
ROOT BEER			

GUEST CHECK

# SERVED	TABLE	By	DATE

INSTRUCTIONAL CHECKLISTS

PROCEDURAL STEPS--Use 10-key Adding Machine

1. Addition
    Enter first number
    Enter next number to be added
    Hit "+" key after each entry
    Hit "Subtotal" or "Total" key
    Proofread entries from tape against originals

2. Subtraction
    Enter first number
    Enter next number to be subtracted
    Hit "-" key
    Hit "Subtotal" or "Total" key
    Proofread entries from tape against originals

3. Multiplication
    Enter first number
    Enter number for multiplication
    Hit "x" key
    Hit "Subtotal" or "Total" key
    Proofread entries from tape against originals

PROCEDURAL STEPS--Filling Out Financial Forms

1. Entries and computations
    - All entries and computations checked
    - Fill in information called for in
        - Vouchers
        - Refund forms
        - Receipts
        - Credit eligibility forms
        - Credit memos

2. Accuracy and appearance
    - 100% accuracy on all entries
    - Neat and legible entries
    - Neat, clean corrections

PROCEDURAL STEPS--Making Bank Deposits

1. Deposit slip
    - Two copies
    - Name and address of depositor
    - Number of account
    - Date of deposit

2. Cash
    - Coins totaled and entered in appropriate space
    - Bills totaled and entered in appropriate space
    - Bills faced the same way

3. Checks listed in appropriate spaces
    - Bank transit number
    - Amount of check

4. Checks endorsed for deposit

5. Total of coins, bills, checks entered in appropriate space

PROCEDURAL STEPS--Message Taking

1. Message--include:
    - Name of caller
    - Date
    - Time
    - Message

2. Put your initials or name as message taker

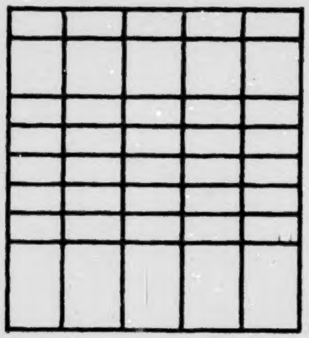
PROCEDURAL STEPS--Writing and Endorsing Checks

1. Writing checks
    - Use ink or typewriter
    - Name of payee written in full
    - No blank space between dollar sign ($) and numbers indicating amount to be paid
    - Any blank spaces filled with lines
    - All entries in correct place
    - All entries correct
    - Purpose of payment written on lower left side of check
    - No erasures

2. Completing check stub
    - Number of check
    - Amount of check
    - Name of payee
    - Balance of account before the check
    - Balance of account after the check
    - Date of check
    - Purpose of the check
    - Any deposits made since writing the last check

3. Endorsing checks
    - Written in ink or rubber stamped endorsements
        - For deposit only
        - Pay to the order of ____________________
        - Signature only of payee shown on face of check
    - Placed on back of check in location that would be the left end of the check when facing

PROCEDURAL STEPS--Record of Personnel Ins and Outs



1. Daily record form
    - If no form available, type up form on stencil and have copies run
    - Form should include
        - Date
        - Name of person
        - Firm of person, if visitor
        - Time person entered
        - Time person left
        - Destination, if employee

2. Entries
    - Make complete and appropriate entries in the columns on the forms

PROCEDURAL STEPS--Checking and Ordering Office Supplies

1. Check supplies on hand
    - Stencils, masters
    - Paper
    - Work order forms
    - Ink, fluids
    - Other
2. Order needed materials
    - Date of order
    - Kind and quantity of supplies needed
    - Nare of person ordering supplies

PROCEDURAL STEPS--Reconciling Bank Statements

1. Arrange cancelled checks by check number

2. Compare checks with stubs to verify amounts

3. Reconcile
    - On one side of ledger, enter
        - Check stub balance as of the last check written in the month being reconciled
        - Deduct any automatic service charges
        - Total the columns
    - On the other side of the ledger, enter
        - Balance shown by bank statement
        - Add any deposits for that month which may not be shown on the statement
        - Total the amount of any outstanding checks
        - Deduct from balance
        - Total the columns
    - Totals in each accounting should be equal

PROCEDURAL STEPS--Making Entries in Journals

1. Headings
    In addition to column headings, enter account or department, name and/or number to be credited or debited
2. Entries
    Date of transaction
    Item or transaction
    Amount of debit, OR
    Amount of credit
    Running balance, if required
    Posting reference
    Source document description in No. column
    Neat and legible
    Corrections neat and clean

PROCEDURAL STEPS--Posting to Ledgers

1. Entries
   Post entries from journals to appropriate ledger (accounts payable, accounts receivable, etc.)

2. Note of posting
   As journal entries are posted, rule the page, also placing checkmarks under totals which are not to be posted

3. Entries posted in correct ledger spaces

4. Neat and legible entries

5. Clean and neat corrections

PROCEDURAL STEPS--Incoming Telephone Calls

1. Identify company
    - Greet caller ("Good morning")
    - Give company name (E. J. Slogan Company)
2. Identify self
    - Say your name ("Miss Jones speaking")
    - Offer service ("May I help you?")
3. Locate called party. Examples:
    - "One moment please"
    - "Mr. Smith, telephone call for you"
4. If wrong number
    - Offer help or information to get right number or extension, or
    - Transfer back to switchboard, or
    - Transfer call through switchboard
5. Place on "hold" when requested person is busy
    - Ask caller if he will go on "hold"
    - Inform caller of the status of his call every 30 seconds
6. Take message--write down
    - Time of call
    - Date of call
    - Name of caller
    - Name of caller's company, if applicable
    - Telephone number (including area code) of caller
    - Content of the spoken message
    - Any instructions about future contact
    - Initials or name of message taker
7. Give information, if requested, or
8. Refer caller to another source for information
9. Courtesy
10. Clear speech

PROCEDURAL STEPS--Outgoing Telephone Calls

1. Place call
    - Get name and number to be called
        - Get number from information, if necessary
        - Contact operator
        - Give operator information for placing call
            - Credit card number, if appropriate
            - Name and number to be called
            - Type of call
                - Station-to-station
                - Person-to-person
        - Ask for time and charges
        - When party is on the line, ask him to hold and connect him with your calling party ("your call to Mr. Smith, Mr. Smith is on the line")
        - If party called is not available, either
            - Leave word to return the call
            - Cancel and place the call later
2. Record of call
    - When placing call, ask operator for time and charges
    - When operator calls back, record time and charges on form or record sheet
    - Enter on form or record sheet for each toll charge placed
        - Person calling
        - Person called
        - Number of person called
        - Location of person called
        - Subject of call
        - Length of time of call
        - Charges on call
            - Indicate whether charges include tax

PROCEDURAL STEPS--Record of Materials Used and Work Done

1. Record

Date request received					
Date work completed					
Name of person requesting services					
Amount of time spent to complete work					
Kinds and amounts of materials used to complete work					
Amount of wasted material					

FILING AND RETRIEVING--INSTRUCTIONAL CHECKLIST

PROCEDURAL STEPS--Filing

1. Locate folder
    Last name first
    Numbers
    Hyphenated name

2. Insert document
    Chronological order
    Document faced

3. File according to last name first

4. If last names are the same, file according to the next name
    Example: Smith, Carleton before
    Smith, Charles or Smith, David

    Smith, Charles A. before
    Smith, Charles D.

5. If last names are not the same, look for first subletter section
    Smith before Snead
    When located, file according to placement of first subletter
    If first subletters are the same, file according to second subletter
    Smith before Smythe
    Continue this procedure until you find a difference in the names

6. If "name' includes numbers, treat the number as a spelled-out word
    Example: 400th Street Market would be treated as Four Hundredth Street Market
    and filed on the basis of Four

7. Treats hyphenated name as two separate words

8. Files documents in correct chronological order in the file

9. Faces documents correctly

10. Does not fold or crease document without cause

NOTE: Procedures listed may apply to filing of more than one document. Failure to follow procedure on any document must be marked as a "fail" in the appropriate column. Procedures need not be carried out in the exact order listed.

PROCEDURAL STEPS--Retrieval

1. Search for folder by last name first

2. If last names on folders are the same, search next by the next name
   Example: Smith, Carleton and Smith Charles
   Search first for "Smith" and next for either Charles or Carleton

3. If last names on folders are not the same, search for first subletter section
   Example: If searching for folder for "Snead," first turn to the "S" section, then to the "Sn" section, and so on until "Snead" file is located

4. If "name" includes numbers, treat number as a spelled-out word and search as in Step 3 above

5. If name is hyphenated, treat it as two separate units and search as in Step 2 or 3 above

6. When folder is located, search within folder according to chronological (date) order

7. If document cannot be located in chronological order, search entire file to be sure document is not there or is there, but is out of order

8. Extract requested document(s) from file

9. Copy document(s) if necessary

10. Make entries in file check-out record

11. Deliver document(s) or copies of document(s) to requestor

12. Refile copied document

PROCEDURAL STEPS--Receiving and Sending Out Mail

1. Incoming mail
    - Open all but "personal" or "confidential"
        - Contents not damaged
        - Everything removed from envelope
        - Saves only envelopes needed for identification of sender attached to correspondence
        - Attaches enclosures to cover letter
        - Makes note on letter if any enclosure is missing
    - Stamp mail--day, month, year, time of arrival
    - Sort mail
    - Deliver to individuals or departments

2. Outgoing mail
    - Check to see if all enclosures are included
        - Get enclosures from files, if requested
        - Return to originator if letter not complete
    - Separate mailable copy from file copy
        - Route file copy to file clerk
    - Check that address on document and envelope are the same--return to originator if they are different
    - Fold mail as required to fit envelope
    - Insert in appropriate size envelope
    - Seal envelope
    - Place in "outgoing" mail box

PROCEDURAL STEPS--Handle Petty Cash Transactions

1. Dispense or take in cash
    - Dispense funds as directed for minor purchases
    - Take in cash for stamps

2. Receipt
    - Give receipt or voucher for cash taken in
    - Obtain receipt or voucher for cash dispensed

3. Record transaction
    - Make entry in petty cash account book for cash received or dispensed

4. Secure cash
    - Keep petty cash secured under lock and key or in safe at all times
    - Turn in cash to supervisor when total cash on hand exceeds amount allocated to petty cash fund

PROCEDURAL STEPS--Computing with Printing Calculator

1. Addition
    - Whole numbers
    - Decimals
    - Cross-adding
    - Subtotal
    - Grand total

2. Subtraction
    - Whole numbers
    - Decimals
    - Subtotal
    - Grand total

3. Multiplication
    - By whole numbers
    - By decimals
    - By constants
    - Accumulative

4. Division--rounded off to two places
    - By whole numbers
    - By decimals

5. Computations
    - Interest
    - Simple discount
    - Extensions with discount and total in one operation

PROCEDURAL STEPS--Coding Material to be Filed

1. Sort and stamp material

2. Determine first, second, and third indexing units

3. Mark indexing units as follows
   One line under first indexing unit: Smith, John J.
   Two lines under second indexing unit: Smith, John J.
   Three lines under third indexing unit: Smith, John J.

4. Indicate cross-reference requirements (if any) by underlining or circling additional index units or by making a note in upper right-hand corner of document as follows
   "Also: Jones, George F."

PROCEDURAL STEPS--Cross-referencing File Materials

1. Document(s) will be cross-referenced if
    More than one name represents the document. For example, correspondence having to do with Mr. Brown and Mr. Jones would be filed under both "Brown" and "Jones

    Name and subject matter represent document. For example, reports from salesmen would be filed under the salesman's name and the document subject matter (expense reports, sales reports, etc.)

    The company name and the individual's name are used as filing units

2. Complete cross-referencing sheet, including
    Name or subject matter of document
    Brief statement of purpose or subject of document
    Date of document
    "See:" enter the title of the file under which the document may be found

3. File original document in primary, most important, or first indexed location

4. File cross-reference sheet (s) in other appropriate file(s) as if the sheet is a copy of the basic document

PROCEDURAL STEPS--Check-out Record

1. Enter name or subject of material
2. Enter date of document
3. Enter date borrowed
4. Enter name of borrower
5. Enter date returned

PROCEDURAL STEPS--Copying Filed Documents

1. Locate document
2. Separate pages of document (if there is more than one) carefully--do not tear
3. Make requested number of copies of each page of document according to procedures established for that copying machine
4. Collate copied pages if more than one page in document
5. Fasten collated pages of document together with stapler or paper clip
6. Reassemble copied document(s) and fasten together (if necessary) for return to file
7. Return copied document(s) to file
8. Deliver copies to requestor

PROCEDURAL STEPS--Abstrating Information from Files

1. Search and locate appropriate file folder(s)
2. Search folder(s) for document(s) containing requested information
3. Write down requested information as it is located, including
    Date of document containing information
    Name or subject material of document
    Requested information
4. Collate abstracted information in chronological order (earliest to most recent)
5. Deliver abstracted information to requestor

PROCEDURAL STEPS--Purging

1. Search and locate appropriate file folder(s) or document(s)
2. Remove folder(s) or document(s) from files
3. Store or destroy purged file(s) or document(s) as instrcted

PROCEDURAL STEPS--Setting up a Filing System

1. Organize materials according to names, subject matter, location, or date
2. Prepare folders for document
3. Put folders in alphabetic, numeric, geographic, chronological, or suspense order, as appropriate
4. Put folders into file cabinet
5. Cross-reference as appropriate

PROCEDURAL STEPS--Use Reference Materials

1. Local, business-located sources
    - Dictionary
    - Atlas
    - Thesaurus

2. Outside sources
    - Library reference desk
    - Newspaper
    - Library
        - Public
        - Law
        - Schools

PROCEDURAL STEPS--Composing Letters and Memoranda

1. Determine content
    - Be certain of nature and intent of content
    - Points to be covered
    - Whether reply is to be requested
    - Whether enclosures are to be made
2. Determine "attitude"
    - Whether the tone should be formal or informal
3. Compose document
    - Use straightforward language
    - Be courteous
    - Include all necessary information
        - Date
        - Addressee
        - Addressor
4. Type final document as transmittable product

PROCEDURAL STEPS--Taking Shorthand

1. Seated posture
    - Back straight
    - Ankles crossed or feet parallel
    - Sitting away from back of chair

2. Holding notebook
    - Book on lap
    - Top slightly raised to comfortable writing angle

3. Taking notes
    - Clear symbols
    - Accurate notes
    - Notes identified
        - Beginning and end
        - Date
        - Addressee
        - Action to be taken
        - Rush actions identified

PROCEDURAL STEPS--Transcribing Shorthand Notes

1. Typing draft
    Transcribe notes as soon as possible after taking them
    Check draft for continuity, grammar, and punctuation
    Check with dictator if uncertain about content or words

2. Disposition of notes
    After typing draft, cross off notes transcribed
    Retain notes for one month

3. Typing final copy
    From draft, type transmittable copy

PROCEDURAL STEPS--Operate Cash Register

1. Machine operation
    - Tape amount adequate
    - Cash drawer closed between transactions
    - Incorrect transactions voided
    - Correct entries made by
        - hitting entry keys
        - hitting operation key
        - looking up sales tax on table
    - Customer given tape receipt
    - Correct change given
    - Checks placed under cash box
    - Bills faced and separated
    - Incoming cash placed on sill until change made
    - Coins separated in cash drawer
2. Audit
    - No shortages
    - No overages

or Discrepancies reported to supervisor